



PeopleSoft 9.0

Basics



CLC Student Administration System

PeopleSoft 9.0 Basic Users Manual

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1. INTRODUCTION

The College of Lake County has been using PeopleSoft software to manage the Human Resources and Student Administration processes of the college. The college has adopted a new version of the PeopleSoft system, PeopleSoft 9.0.

The new version of PeopleSoft includes all of the functionality of the previous PeopleSoft 8 system. Additionally, the PeopleSoft 9.0 system has some additional functionality, including bookmarking within the application, downloading data to Excel, and sending e-mails from within PeopleSoft.

This manual includes step-by-step instructions on how to use the new system and how the navigation has changed. The table of contents at the beginning of the document outlines each of the areas covered in this manual.

IMPORTANT NOTICE

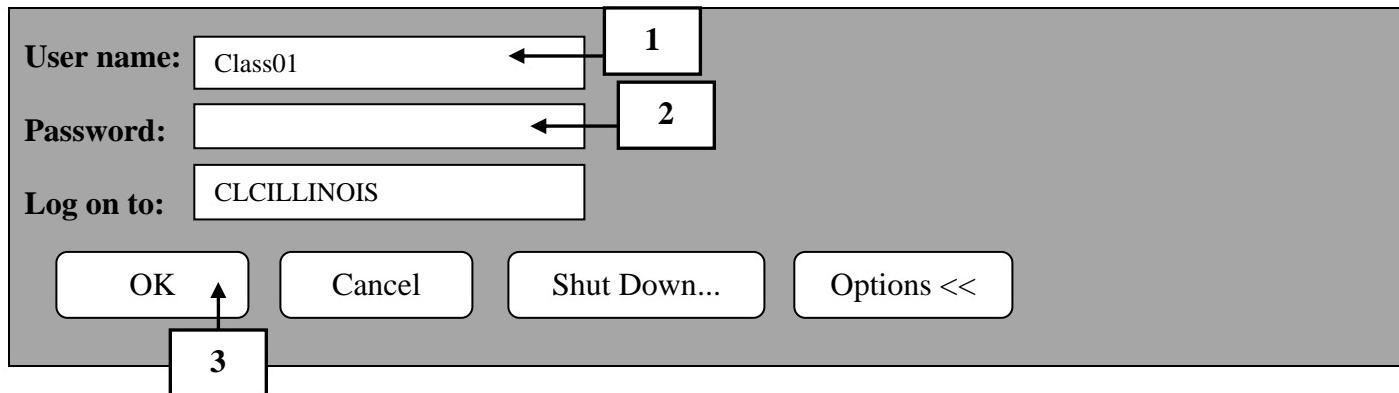
The screen snaps throughout this manual reflect the PeopleSoft 9 system as of 9/01/08. You may notice slight screen differences, between those in this manual and the “live” system, if the PeopleSoft system has changed after 9/01/08.

2. GETTING STARTED

LOGGING INTO THE NETWORK

When you first turn on the computer you will need to log into the network. You will see a login box as shown below.

1. Enter your **Network User name**.
2. Enter your **Network password**.
3. Click **OK**.



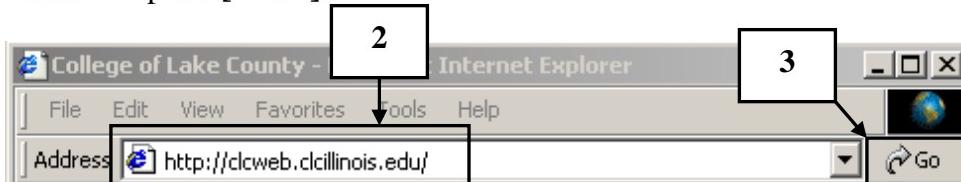
ACCESSING PEOPLESOFT

Once you have logged onto the network, you will need to access the web-based system. To access the system:

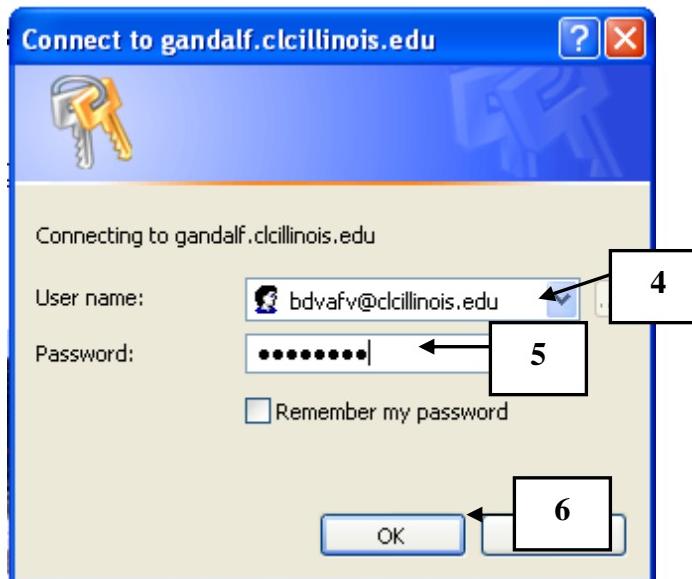
1. Bring up **Internet Explorer**.

You can click on the Internet Explorer icon, , in your taskbar.

2. Type **http://clcweb.clcillinois.edu**.
3. Press the **Go** button or press **[Enter]**.



4. Type in your **Network User Name** followed by @clcillinois.edu and press **[Tab]**.
5. Type in your **Network Password** and press **[Tab]**.
6. Click on the **OK** button or press **[Enter]**.



GUIDELINES FOR CREATING PASSWORDS

A compromised password not only puts a user's E-mail and files at risk, but may also expose sensitive CLC data and systems. All members of the CLC community are responsible for taking the appropriate steps to select and secure their passwords. It is also a must to have a strong password policy in place to meet regulatory and audit requirements. This document outlines the guidelines and requirements for choosing, managing, and protecting strong passwords at CLC.

One of the most common methods that attackers use to guess passwords is known as a *brute force attack*. In a brute force attack, the attacker systematically tries possible passwords until he manages to break into an account. Attackers frequently use dictionary files to generate lists of possible passwords. Choosing passwords that are easy to remember but hard for an attacker to guess, will significantly improve the security of the computer and data.

The following guidelines should be considered when creating a password:

Steps 1 – 3 are Required

- 1. At least eight characters long**
- 2. The first character MUST BE AN ALPHA CHARACTER AND CAPITALIZED.**
- 3. Must contain at least one numeric character**
- 4. May contain at least one punctuation or symbol character (e.g. !@#\$%^&*()_+ | ~- =\`{}[]:"';<>?,./)**
- 5. Are not trivially derived from the user's CLC Network ID, name, or a dictionary word.**

6. Avoid using dictionary words in your passwords. This includes foreign language words, slang, jargon, and proper names.
7. Avoid using passwords that contain words associated with CLC, such as lancers, Grayslake, brandel, etc.
8. Avoid common misspellings and substitutions in your passwords (e.g. replacing "e" with "3" or "i" with "1")
9. Avoid using passwords that are based on any personal information, such as name, user ID, birthdates, addresses, phone numbers, or relatives' names.
10. Do not use sample passwords, such as the ones included in this guide.

Think up a phrase or part of a book, poem, or song and use part of it to form a memorable password. For example:

Only 50 more days until I graduate from SFS!, would be O50mduIgfSFS!
All of Gaul is divided into 3 main parts, would be "AoGidi3mp."

These guidelines were taken from an e-mail composed by Ratnakar Nanavaty 6-27-05.

Guidelines for Protecting Passwords

1. Password security is the responsibility of the end user. The end user will be held accountable for any misuse of guessed, disclosed, or compromised passwords.
2. Do not share passwords with anyone, including supervisors, administrative assistants, secretaries, and technology service providers. It is against CLC policy for a technology service provider to request a user's passwords. If someone demands a password, refer them to this document or have them call someone in the CLC Information Security Office.
3. Do not use the CLC Network ID password for any other account or service at CLC or elsewhere. Your CLC Network ID password should be unique from any other password used.
4. Avoid using the same passwords for CLC accounts as for other non- CLC access (e.g., personal ISP accounts, free online E-mail accounts, instant messaging accounts, other online services, etc.). This will limit exposure if any of passwords are compromised.
5. Avoid storing passwords within applications or using the "Remember Password" feature (e.g. Netscape Messenger, Internet Explorer, etc.). These features typically do not adequately protect passwords, and it may be possible for a computer virus or unauthorized user to gain access to this information.
6. Do not write passwords down or store them anywhere in the office. Do not store passwords in a file on any computer system (including PDAs or similar devices) without using strong encryption.
7. If the account or password may have been compromised, report the incident to the CLC Information Security Office and change the password immediately.



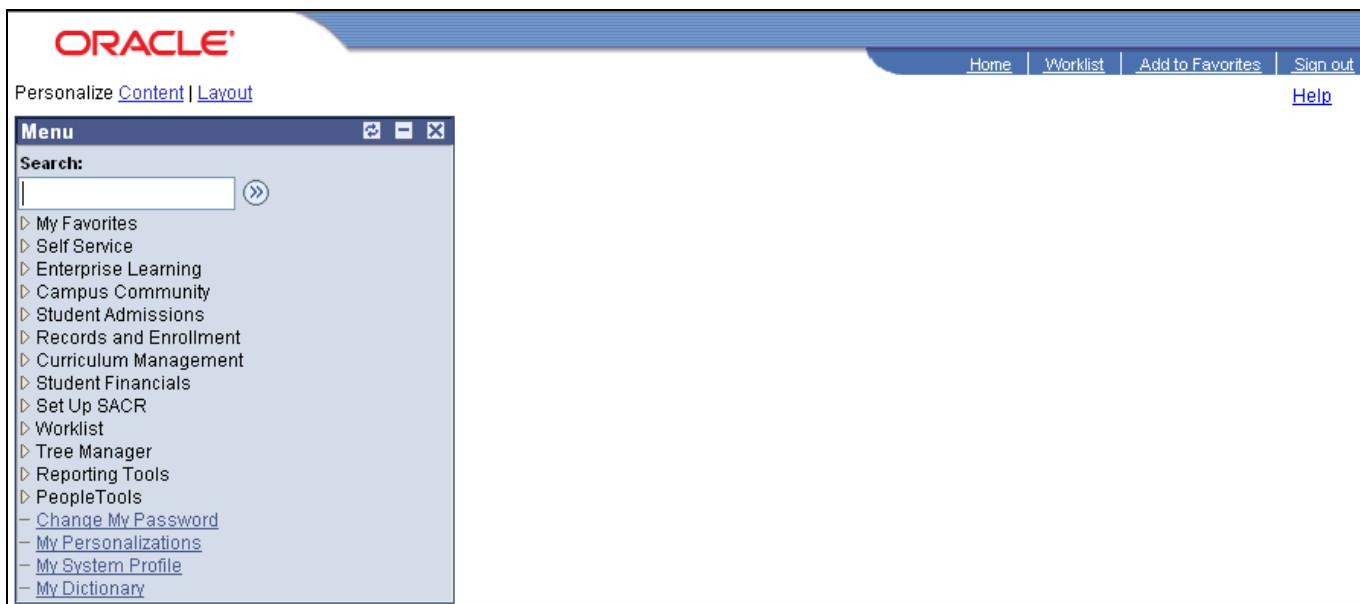
1. Near the top of the page, under the Faculty & Staff Resources section, click on the **Student Administration & Human Resources - PRODUCTION** link on the page.

The screenshot shows the CLC Intranet homepage. In the center, there's a navigation bar with links: Departments, Divisions & Disciplines, Directory, Governance, and CLC Public Web Site. Below this is a section titled "Faculty & Staff Resources". It contains a link to "CLC Administrative Systems". Underneath are two main categories: "Student Administration & Human Resources -- PRODUCTION" and "Finance System -- PRODUCTION". A callout box labeled "1" points to the "Student Administration & Human Resources -- PRODUCTION" link. Below these are links for "Student Admin & Human Resources -- TRAINING", "Student Self Service -- PRODUCTION", and "PeopleBooks". Further down are links for "Outlook Email Web Access" and "Document Imaging". At the bottom of the section are links for "Grayslake Campus Events" (published weekly by Ed Affairs), "Human Resources", "Professional Development", and "Professional Development Center". Finally, there's a link for "Academic Quality Improvement Program (AQIP)".

2. Enter your **User ID**.
3. Enter your **Password**.
4. Click the **Sign In** button or press Enter.

The screenshot shows the sign-in page for the College of Lake County. On the left is a photograph of a modern building interior with a curved glass wall and greenery. To the right is a form with a red header that reads "Use your CLC NETWORK ID & Password.". The form has two input fields: "User ID:" containing "bdvafv" and "Password:" containing a masked password. A callout box labeled "2" points to the User ID field, and another labeled "3" points to the Password field. A fourth callout box labeled "4" points to a yellow "Sign In" button. Below the form is a message: "If you are unable to sign in, please call Help Desk at Extension 2052." At the bottom left, there's a footer with "Human Resources & Student Administration System". The bottom of the page features a decorative footer bar with small images of people and the text "All rights reserved. © College of Lake County 2003".

The new PeopleSoft 9.0 home page will display, as seen below:



Note: Screen shots in this manual may include areas of the system where you do not have access.

Tip: You may want to consider setting the CLC Intranet home page as a Favorite in Internet Explorer, so that you can quickly access the PeopleSoft log in screen. For help with this, refer to the “Working with Favorites in Internet Explorer” section of this manual. Otherwise, you may want to make the CLC Intranet your home page on your PC, so that it will automatically come up when you launch Internet Explorer. Instructions on setting up the CLC Intranet as your home page follow.

SETTING UP THE CLC INTRANET AS YOUR HOME PAGE

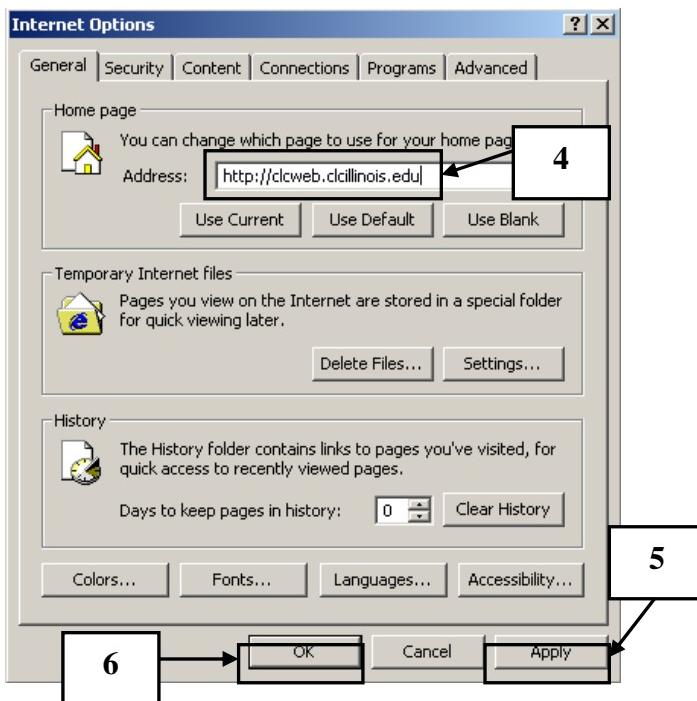
To make the CLC Intranet page your home page:

1. Launch **Internet Explorer** by clicking on the Internet Explorer icon, .
2. Click on **Tools** in the menu bar of Internet Explorer.



3. Click on **Internet Options**.

4. In the Internet Options window in the Home page section at the Address line type: <http://clcweb.clcillinois.edu>.
5. Click the **Apply** button.
6. Click the **OK** button.



The CLC Intranet home page will now appear on your PC whenever you launch Internet Explorer.

TIMING OUT IN THE SYSTEM

For security purposes the system automatically logs you off after 20 minutes of inactivity. If you are inadvertently logged off the system, due to idle time, and wish to return to your application, the following screen will appear.

1. Click the **Sign in to PeopleSoft** link to return to the login screen.



! Warning ! Please keep in mind that anything you have entered, and not saved, will be lost if you are inadvertently logged off the system.

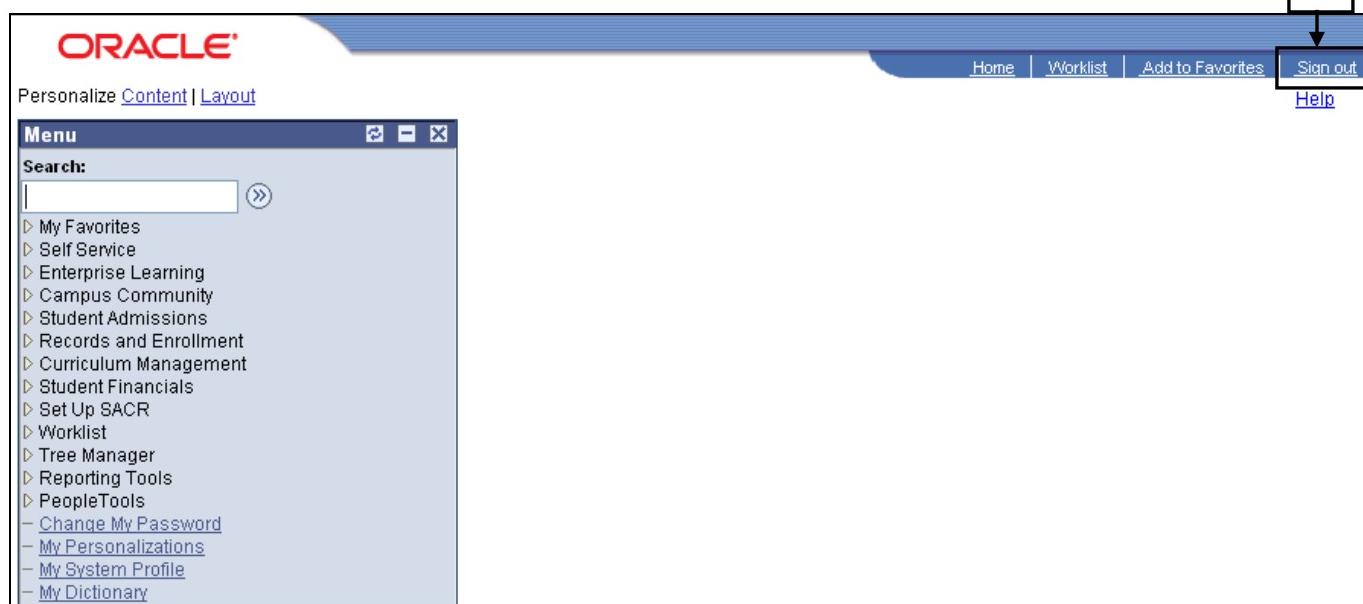
Once you have clicked the sign in link, the login screen will appear, and you can once again login to the system. Therefore, it is always best to regularly save your work, especially before you leave your workstation for an extended period of time, because anything entered and not saved will be lost if the system logs you off.

Tip Sign out of the system if you are done using it, or if you will be away from the system for more than 20 minutes. Also be sure to always Lock your computer by pressing [Ctrl]+[Alt]+[Delete] and choose the “Lock Workstation” option, or log off the system completely, when you leave your desk.

LOGGING OFF OF PEOPLESOFT

When you have finished using PeopleSoft or will be away from your desk for 20 minutes or more, you should log off of PeopleSoft. To log off of PeopleSoft:

1. Click on the **Sign out** link in the top right corner.



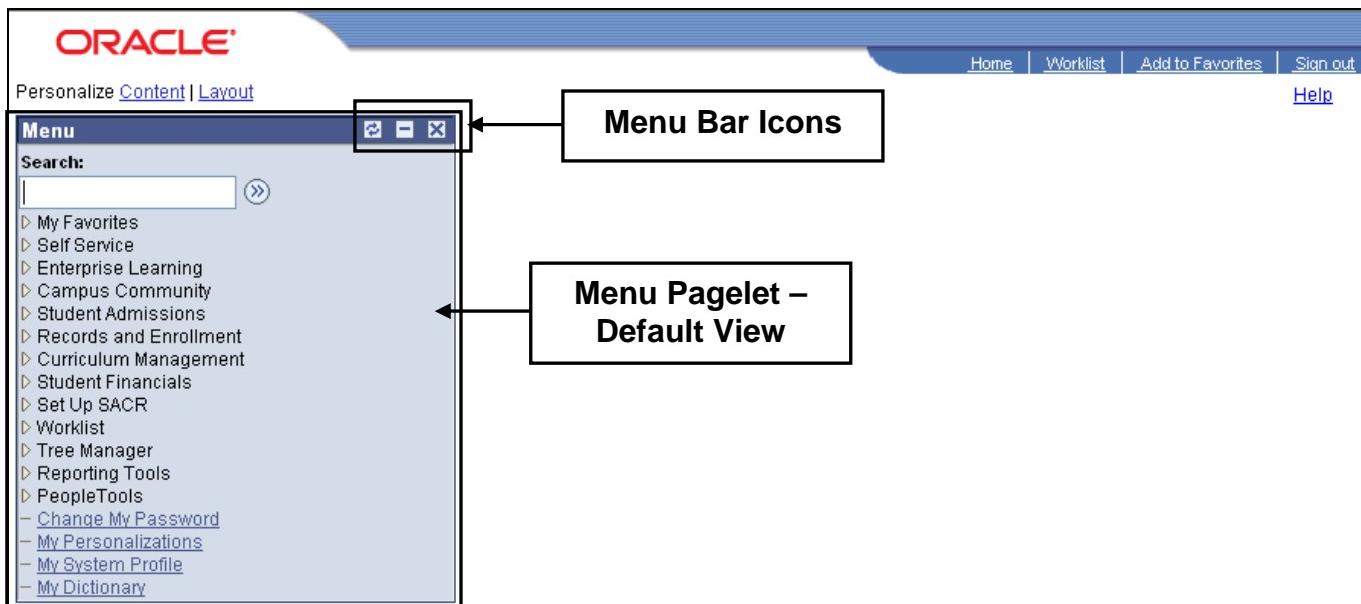
Note You can sign out whenever the “Sign Out” link appears in the toolbar. There is no need to return to the Home page to sign out.

Tip If not available, open a second window and sign out of it. Then close the first window. This will bring up the Sign In screen.

3. USING THE MENUS

MENUS

The PeopleSoft 9.0 system uses menus extensively as navigational tools. When you first log into PeopleSoft 9.0, the homepage will display as seen below. The number of menu items displayed in the Menu window will depend on the security of each user.



Each window in the PeopleSoft 9.0 system is called a “pagelet”. The Menu pagelet above has three Menu bar icons in the title bar at the top. The table below describes the function of each of the Menu bar icons.

Icon	Description
Refresh	Refreshes the window
Minimize	Minimized the window
Close	Removes the window from the home page.

1. Click the **Minimize** button, in the Menu pagelet.

The Menu pagelet is no longer visible. Only the Menu title bar is visible.



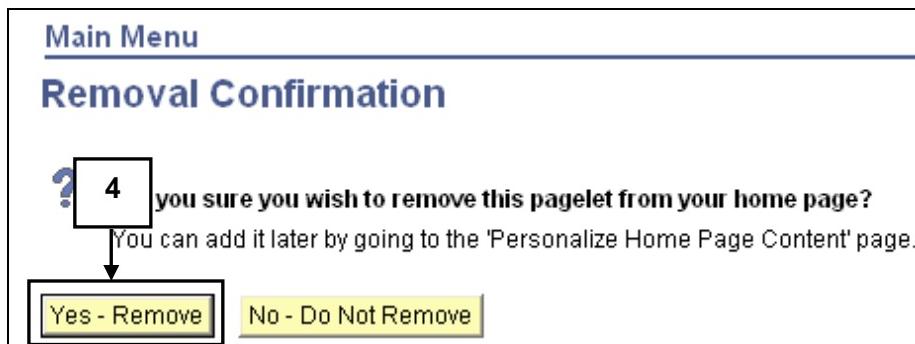
2. Click on the **Maximize** button, , in the Menu title bar.

The full menu screen will display again.

3. Click on the **Close** button, , in the Menu pagelet.

A Removal Confirmation for the Menu pagelet will display.

4. Click the **Yes-Remove** button.

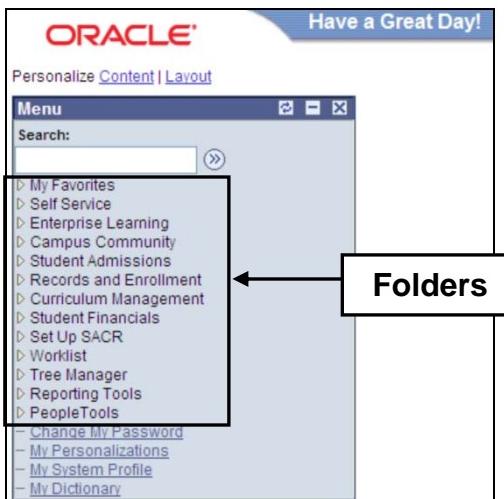


The Main Menu window will no longer display on the screen.

Note: You should only minimize or close the Main Menu when other menus are visible on the screen.

USING MENUS

On the left side of the PeopleSoft 9.0 home page the Menu pagelet is displayed. It contains a list of folders, which provide the primary method for moving through the system. This list contains the areas of the system to which you have access.



Note: The Menu pagelet displays all folders available to the current user. The folders available will vary based on the user's security permissions.

DISPLAYING AND HIDING THE MENU PAGELET

The Menu pagelet can be displayed (expanded) or hidden (collapsed) at any time. To collapse the menu pagelet, click the  button. To re-expand the menu pagelet, click the  button.

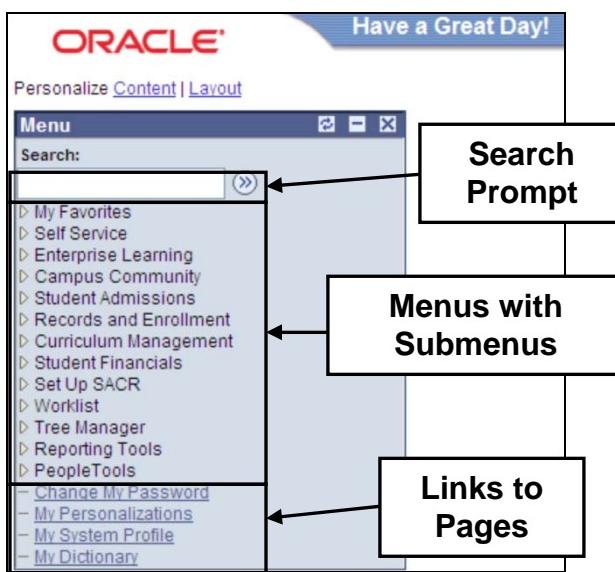


The **Ctrl** (Control) **Y** hot key combination will also collapse and expand the menu.

USING THE MENU PAGELET

To use the Menu pagelet you may either select a folder (or menu item) in the list or use the search prompt at the top of the window to search for a particular folder.

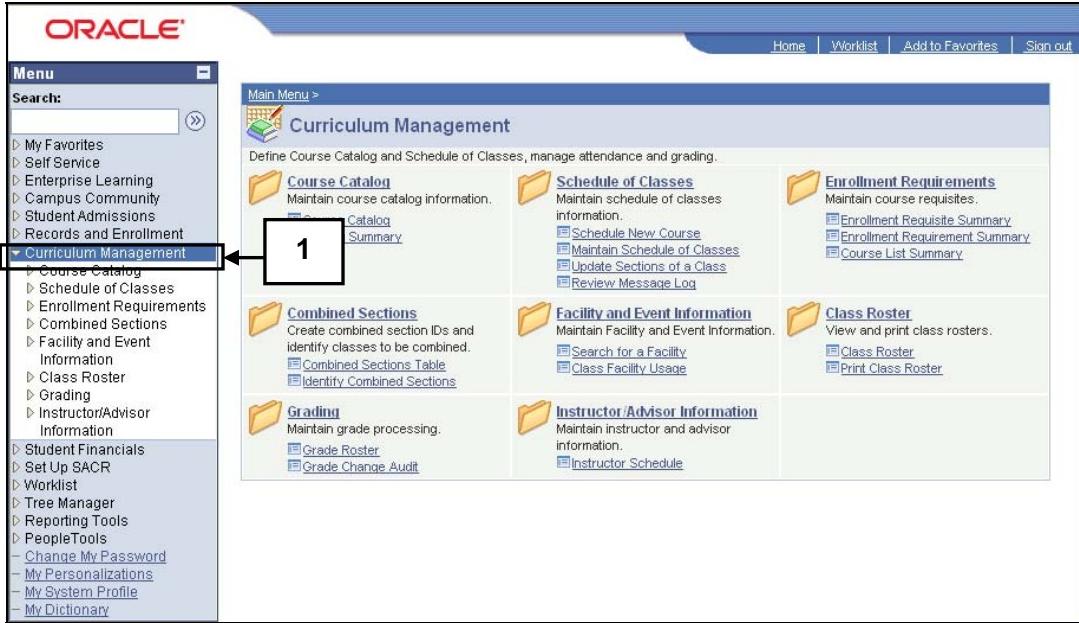
Navigation to pages is accomplished through selections in the Menu. If a Menu selection has other choices associated with it, you will see an arrow pointing sideways towards the selection, . This indicates that there are submenus associated with the menu item. If a Menu choice is open and the additional submenus associated with it are visible, the arrow next to the Menu choice will point downwards, . If a Menu choice navigates you directly to a page, it will have a hyphen in front and be underlined in blue type suggesting that it is a hyperlink to a page.



To select a Menu item, click your mouse on the desired selection. This will expand the associated Menu choice to its submenu. You may also click on any of the page links at the bottom of the Menu pagelet.

OPENING A PAGE FROM THE NAVIGATION MENU

- Click on **Curriculum Management** in the Menu pagelet.

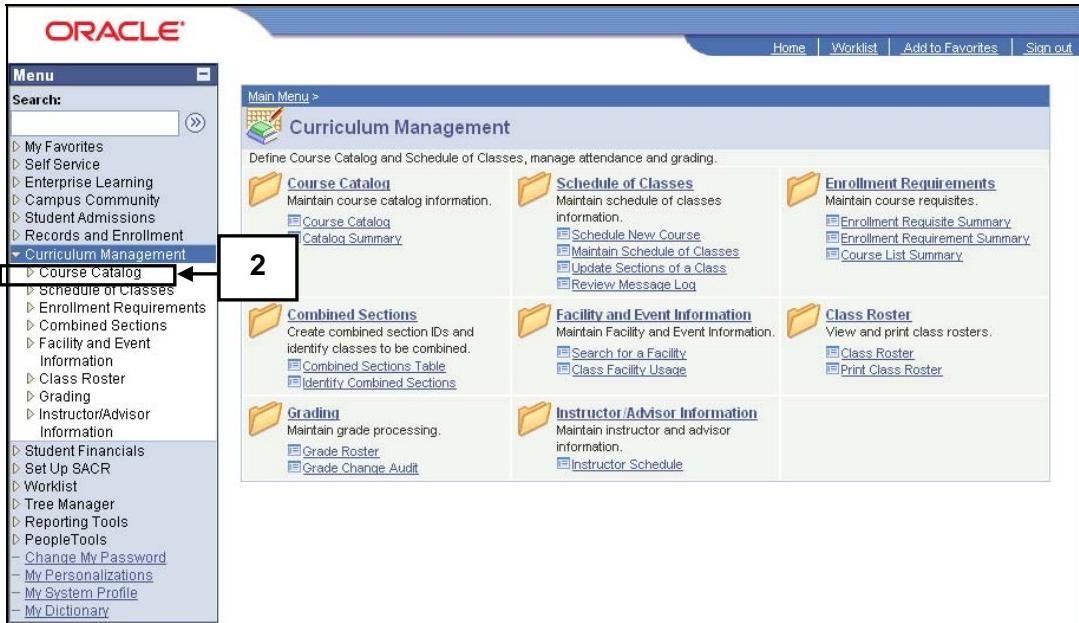


The screenshot shows the Oracle PeopleSoft interface. On the left, there is a vertical **Menu** pagelet with a search bar and a list of links. The link **Curriculum Management** is highlighted with a red box and has a black number '1' placed over it. To its right is the **Main Menu > Curriculum Management** pagelet. This pagelet has a title 'Curriculum Management' with a brief description: 'Define Course Catalog and Schedule of Classes, manage attendance and grading.' Below the title are six menu items, each with a folder icon and a brief description:

- Course Catalog**: Maintain course catalog information. Sub-items: Catalog, Summary.
- Schedule of Classes**: Maintain schedule of classes information. Sub-items: Schedule New Course, Maintain Schedule of Classes, Update Sections of a Class, Review Message Log.
- Enrollment Requirements**: Maintain course requisites. Sub-items: Enrollment Requisite Summary, Enrollment Requirement Summary, Course List Summary.
- Combined Sections**: Create combined section IDs and identify classes to be combined. Sub-items: Combined Sections Table, Identify Combined Sections.
- Facility and Event Information**: Maintain Facility and Event Information. Sub-items: Search for a Facility, Class Facility Usage.
- Class Roster**: View and print class rosters. Sub-items: Class Roster, Print Class Roster.
- Grading**: Maintain grade processing. Sub-items: Grade Roster, Grade Change Audit.
- Instructor/Advisor Information**: Maintain instructor and advisor information. Sub-items: Instructor Schedule.

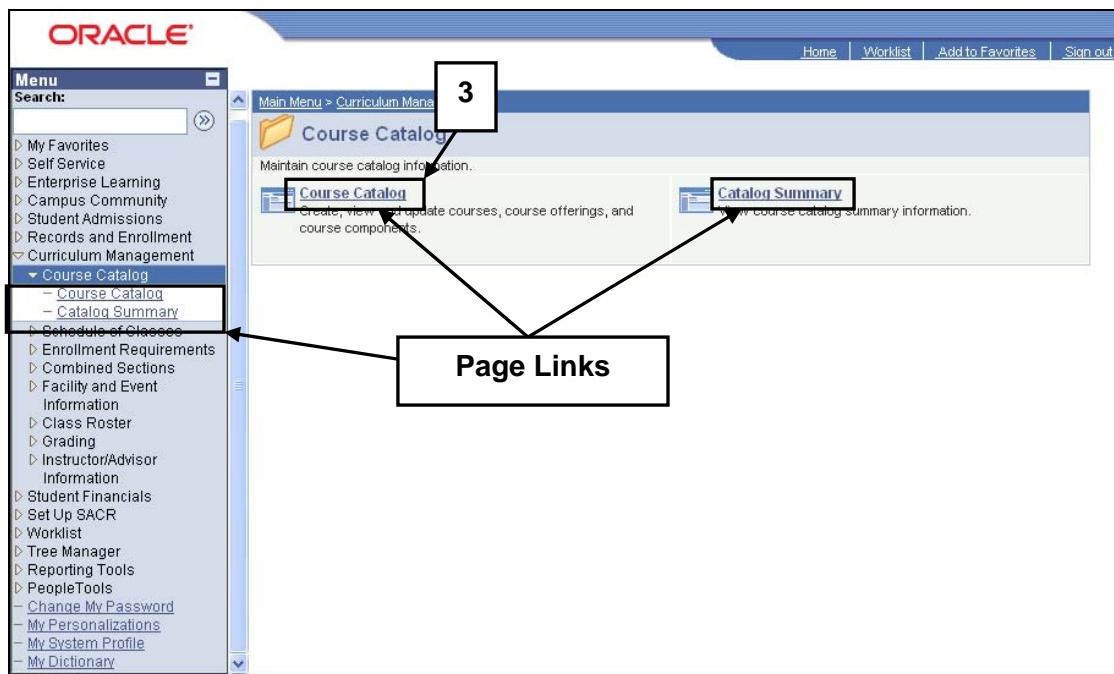
The Curriculum Management menu will expand and the submenus will now be available. The Main Menu pagelet will also be visible as seen to the right. You can access any of the submenu options, Course Catalog, Schedule of Classes, Enrollment Requirements, Combined Sections, Faculty and Event Information, Class Roster, Grading and Instructor/Advisor Information by clicking on the menu item in either the Menu pagelet or the Main Menu pagelet.

- Click on the **Course Catalog** menu item in the Menu pagelet.



This screenshot is similar to the previous one, but the **Course Catalog** item in the **Curriculum Management** menu is now highlighted with a red box and has a black number '2' placed over it, indicating it has been selected. The rest of the interface remains the same, showing the expanded Curriculum Management menu and the Main Menu pagelet.

The page links, Course Catalog and Catalog Summary will now be visible in both the Menu and Main Menu pagelets.



- Click on the **Course Catalog** link in the Main Menu pagelet.

The Course Catalog search screen will display.

A screenshot of the 'Course Catalog' search screen. The search criteria are as follows:

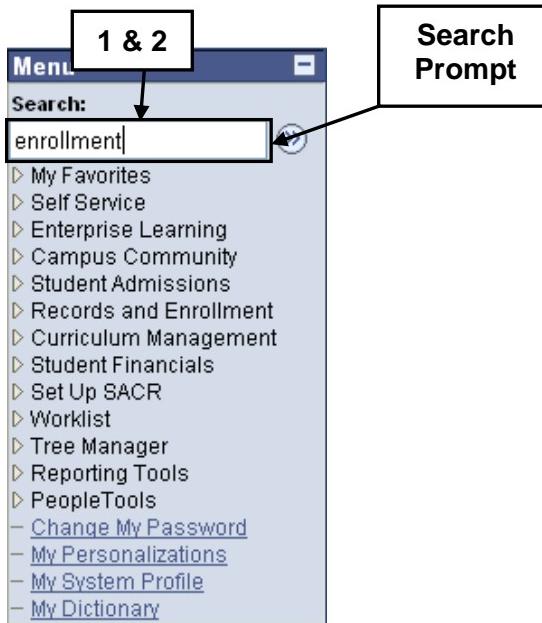
- Academic Institution: CLCCC
- Subject Area: (empty)
- Catalog Nbr.: begins with
- Campus: (empty)
- Course ID: (empty)
- Description: (empty)

At the bottom of the search form are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

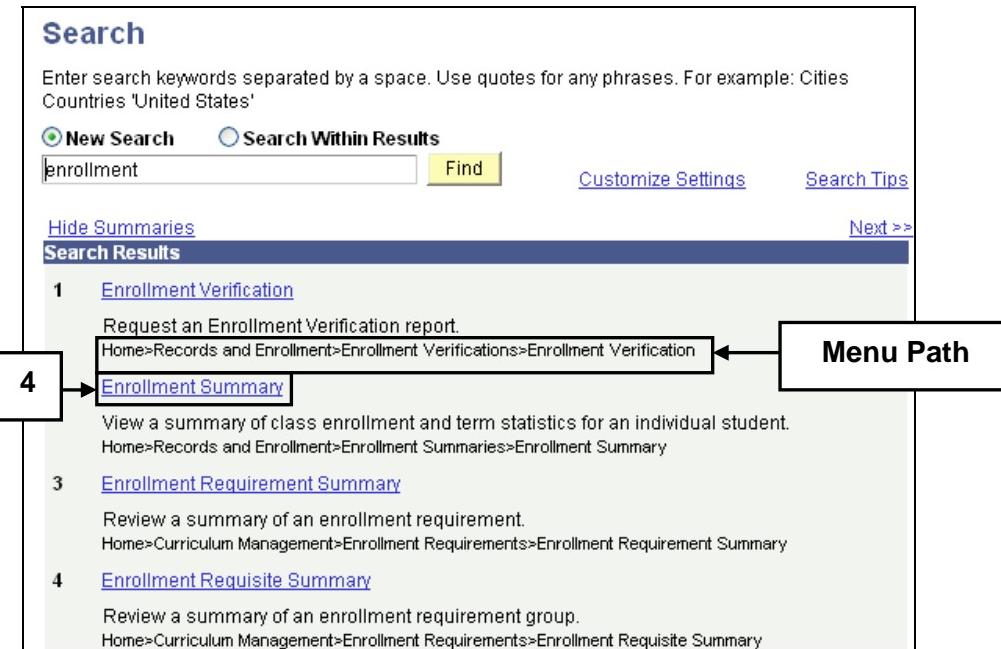
USING THE MENU SEARCH FUNCTION

There is a Search prompt at the top of the menu pagelet. If you are not sure where to find information in PeopleSoft 9.0, simply type in a keyword and then press Enter. We will search for student enrollment information using the search prompt.

1. Click in the **Search: prompt** at the top of the menu pagelet.
2. Type **enrollment**.
3. Press **Enter**.



A search screen like the one below will display. A list of each menu item appears as a hyperlink along with a description of the menu. The path to the menu item also displays under the description.

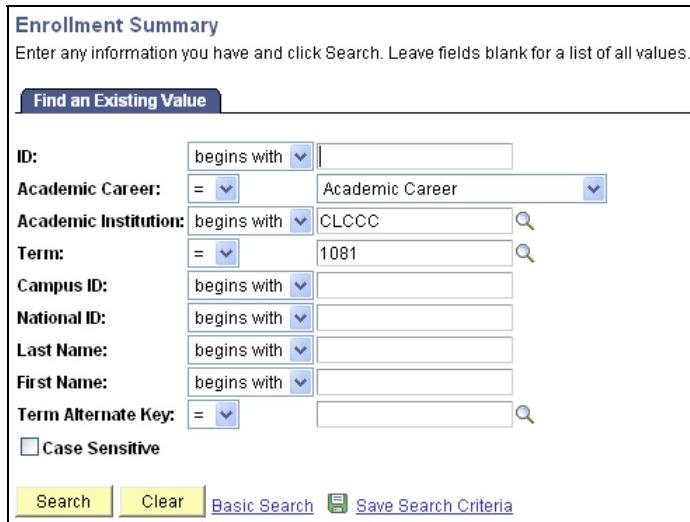


The screenshot shows a search results pagelet titled "Search". It has a search bar with "enrollment" typed in, a "Find" button, and links to "Customize Settings" and "Search Tips". Below the search bar is a "Search Results" section with a table. The table has four columns: a numbered row, a link, a description, and a "Menu Path" column. Row 1: [Enrollment Verification](#), Request an Enrollment Verification report. Home>Records and Enrollment>Enrollment Verifications>Enrollment Verification. Row 2: [Enrollment Summary](#), View a summary of class enrollment and term statistics for an individual student. Home>Records and Enrollment>Enrollment Summaries>Enrollment Summary. Row 3: [Enrollment Requirement Summary](#), Review a summary of an enrollment requirement. Home>Curriculum Management>Enrollment Requirements>Enrollment Requirement Summary. Row 4: [Enrollment Requisite Summary](#), Review a summary of an enrollment requirement group. Home>Curriculum Management>Enrollment Requirements>Enrollment Requisite Summary. A callout box labeled "4" points to the number 4 in the first row. A callout box labeled "Menu Path" points to the "Home>" part of the path descriptions.

1	Link	Description	Menu Path
1	Enrollment Verification	Request an Enrollment Verification report.	Home>Records and Enrollment>Enrollment Verifications>Enrollment Verification
2	Enrollment Summary	View a summary of class enrollment and term statistics for an individual student.	Home>Records and Enrollment>Enrollment Summaries>Enrollment Summary
3	Enrollment Requirement Summary	Review a summary of an enrollment requirement.	Home>Curriculum Management>Enrollment Requirements>Enrollment Requirement Summary
4	Enrollment Requisite Summary	Review a summary of an enrollment requirement group.	Home>Curriculum Management>Enrollment Requirements>Enrollment Requisite Summary

4. Click on the **Enrollment Summary** hyperlink.

The Enrollment Summary search screen appears, as seen to the right. You can then enter your search fields to view enrollment data for a specific person.

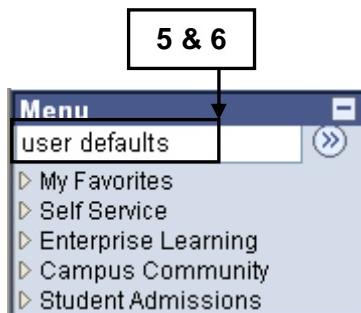


Enrollment Summary
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

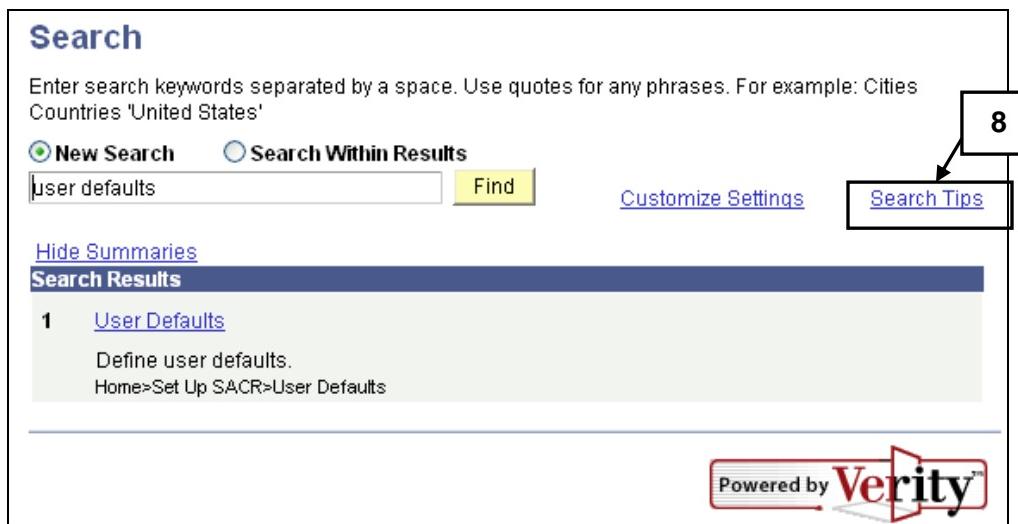
ID:	begins with	<input type="text"/>
Academic Career:	=	Academic Career
Academic Institution:	begins with	CLCCC
Term:	=	1081
Campus ID:	begins with	<input type="text"/>
National ID:	begins with	<input type="text"/>
Last Name:	begins with	<input type="text"/>
First Name:	begins with	<input type="text"/>
Term Alternate Key:	=	<input type="text"/>
<input type="checkbox"/> Case Sensitive		
<input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Basic Search"/> <input type="button" value="Save Search Criteria"/>		

5. Click in the **Search:** prompt again.
6. Type **user defaults**.
7. Press **Enter**.



The Search screen will display, as seen below.

8. Click on the **Search Tips** hyperlink.



Search

Enter search keywords separated by a space. Use quotes for any phrases. For example: Cities Countries 'United States'

New Search **Search Within Results**

[Search Tips](#) 8

[Hide Summaries](#)

Search Results

1 [User Defaults](#)
Define user defaults.
Home>Set Up SACR>User Defaults

Powered by Verity™

A list of suggestions for using the Search: prompt will display.

9. Click on the **Return to Search** hyperlink.

Search

Search Tips

Search Examples

Phrases
Use quotes around words that make up a phrase. For example:
'Stock Option'

All Words
Use an 'and' to specify that all words must appear in the results. For example:
'Stock Option' and grant

Any Words
Use an 'or' to specify that any word must appear in the results. For example:
'Stock Option' or bonus

[Return to Search](#) 9

The Search screen will display again.

10. Click on the **Customize Settings** hyperlink.

Search

Enter search keywords separated by a space. Use quotes for any phrases. For example: Cities Countries 'United States'

New Search Search Within Results

10

[Customize Settings](#) [Search Tips](#)

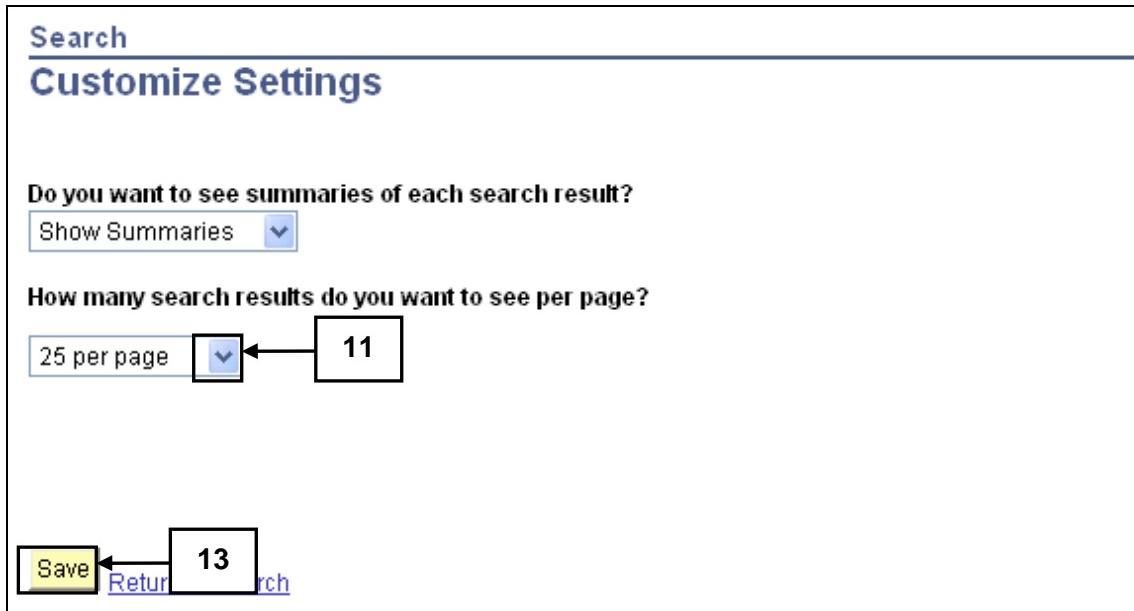
[Hide Summaries](#)

Search Results

1 [User Defaults](#)
Define user defaults.
Home>Set Up SACR>User Defaults



You can customize your search results by hiding summaries and changing the number of search results you would like to see on a page.



The screenshot shows a 'Search' window titled 'Customize Settings'. It contains three configuration sections:

- Do you want to see summaries of each search result?**: A dropdown menu set to 'Show Summaries'.
- How many search results do you want to see per page?**: A dropdown menu currently set to '25 per page', with a value of '11' highlighted.
- Action buttons at the bottom:** 'Save' (highlighted), 'Return' (disabled), and 'Search'.

11. Click the **down arrow** to the right of 25 per page.
12. Select **10 per page**.
13. Click the **Save** button.

Now when you use the search prompt, your search result lists will display in groups of 10.

PRIMARY ELEMENTS OF WINDOWS

There are several common elements to windows in the system. Understanding these elements and how they function will help you to effectively use the system. Many different types of elements are used to organize information on pages and to allow you to enter data into the system.

NAVIGATION HEADER

The navigation header area remains static as you move through the various areas of the system and appears as follows:

There are three primary buttons on the navigation header:

1. Home
2. Add to Favorites
3. Sign Out

The following table provides information about the buttons contained in the navigation header.

Navigation Header Button	Function
Home  Home	Takes you back to the Home page in the PeopleSoft 9.0 system.
Add to Favorites  Add to Favorites	Save the current page as a favorite in PeopleSoft 9.0. Once the favorite has been created, you can access it using the My Favorites menu item. Detailed information on using this feature can be found in the Using Favorites section of this manual.
Sign Out  Sign out	Use to sign out of the system, when you would like to leave Internet Explorer open. Pressing this button will take you back to the PeopleSoft login screen. Note: Be sure to save your work before signing out.

! Warning ! -

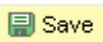
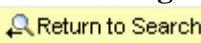
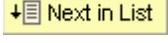
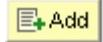
ALWAYS USE THE SIGN OUT OPTION TO LOG OFF OF PEOPLESOFT!
Do not use the close button in the Internet Explorer browser to end your Peoplesoft session.

TOOLBAR BUTTONS

At the bottom of most pages you will find buttons. These buttons change dynamically, depending on the type of page in use. The buttons come in three different types:

1. search list navigation buttons,
2. page navigation buttons and
3. page action buttons.

The table below provides a list of toolbar buttons along with a description of each:

Toolbar Button	Function
Save 	Saves information you have entered into the page. Generally, you will save when you come to the end of a component. The Save command updates the data for all pages in a component.
Return to Search Page 	Returns you to the last search page used.
Next In List 	Displays the data for the next record in your search results list. The button will be unavailable, or grayed out, if you did not select the record from a search results list, if there was a single row in the list, or if the data displayed is the last record in the list.
Previous in List 	Displays the data for the previous record in your search results list. The button will be unavailable, or grayed out, if you did not select the record from a search results list, if there was a single row in the list, or if the data displayed is the first record in the list.
Update/Display 	Provides access to existing rows of data. If the data is effective-dated, it will display only current and future rows.
Include History 	Displays all rows of data: current, future and history.
Add 	Allow you to add a new record.
Refresh Page 	Reloads the current page to the screen, thereby ensuring that the most current information is displayed.
Go to Page Button 	Displays when there are several pages that are related to the current page. Clicking this button opens a new page with a list of related page links.

WORKING WITH COMPONENTS AND PAGES

The system is made up of components and pages. Components are the functional areas in the system, and consist of multiple pages. There are hundreds of different components in the system. Some examples of components in the system are:

- User Defaults
- Course Catalog
- Student Training History
- Biographical (Student)

You will have access to components based on your security level in the system.

In the screen below, we are looking at the User Defaults component:

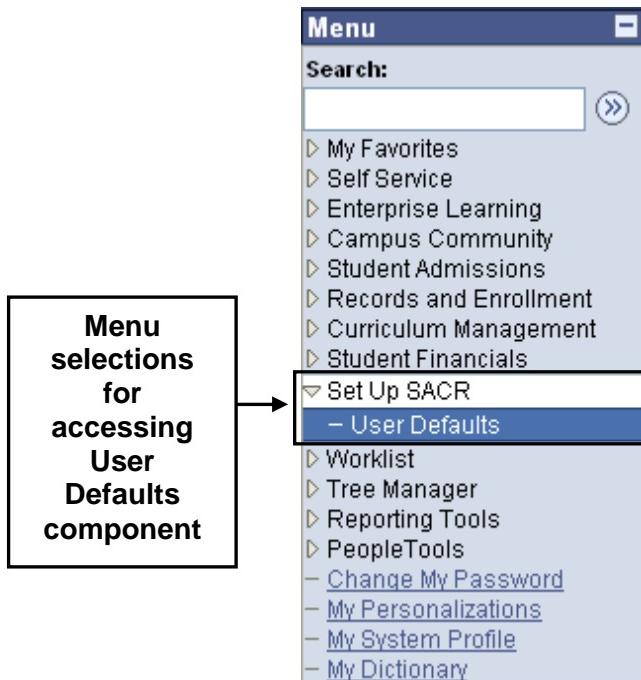
User Defaults 1 User Defaults 2 User Defaults 3 User Defaults 4 Enrollment Override Defaults 

User ID:	Name:	
Academic Institution:	<input type="text" value="CLCCC"/> 	College of Lake County
Career Group SetID:	<input type="text"/> 	
Facility Group SetID:	<input type="text"/> 	
Academic Career:	<input type="text" value="ACAD"/> 	Academic
Academic Group:	<input type="text"/> 	
Subject Area:	<input type="text"/> 	
Term:	<input type="text" value="1081"/> 	Spring 2008
Academic Program:	<input type="text"/> 	
Academic Plan:	<input type="text"/> 	
Academic Sub-Plan:	<input type="text"/> 	

 Save

[User Defaults 1](#) | [User Defaults 2](#) | [User Defaults 3](#) | [User Defaults 4](#) | [Enrollment Override Defaults](#) | [Communication Speed Keys](#) | [User 3C Groups Summary](#)

Components are accessed from the menu lists. To reach a given component, you will move through a succession of menus and sub-menus. In the example above the menu items chosen were Set Up SACR followed by User Defaults.



(For more information regarding menus, refer to the “Using the Menus” section of this manual.)

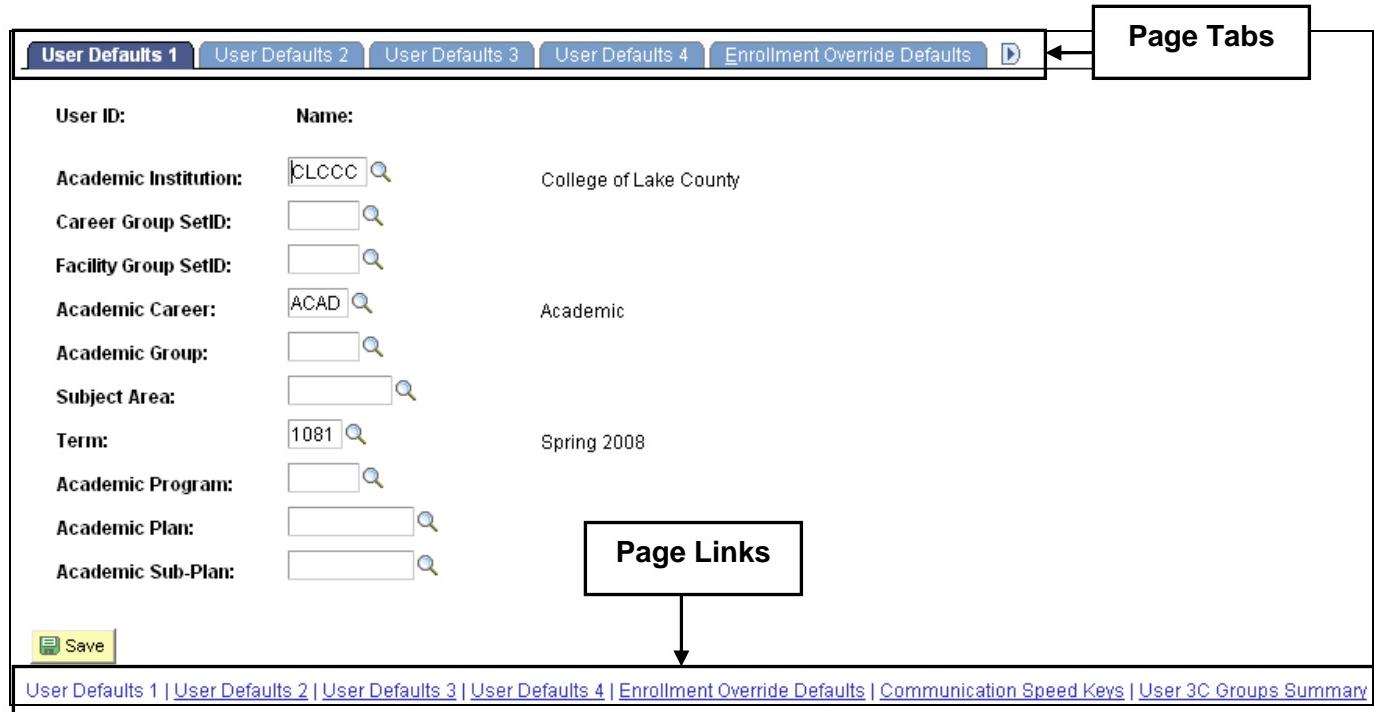
Pages in the system are the individual display screens, and provide a means for performing the following operations in the system:

- viewing,
- updating and
- editing data.

Pages make up the components and are much like pages of a form. You can leaf through the pages in a component, just as you can the pages in a form. Additionally, just as you may need to complete each page of a multi-page form, in many cases, you will need to enter data into all pages of a given component.

MOVING BETWEEN PAGES OF A COMPONENT

The easiest way to move between pages in a component is to click on the page tabs at the top of the page or the page links at the bottom of the page. The screen display below shows the page tabs and links associated with the User Defaults component:



The screenshot shows the User Defaults component interface. At the top, there are five tabs labeled "User Defaults 1", "User Defaults 2", "User Defaults 3", "User Defaults 4", and "Enrollment Override Defaults". The "User Defaults 1" tab is highlighted. To the right of these tabs is a "Page Tabs" label with a left-pointing arrow. Below the tabs is a table of search fields. To the right of the table is a "Page Links" label with a downward-pointing arrow. At the bottom of the page are several links: "User Defaults 1", "User Defaults 2", "User Defaults 3", "User Defaults 4", "Enrollment Override Defaults", "Communication Speed Keys", and "User 3C Groups Summary".

User ID:	Name:	
Academic Institution:	CLCCC 	College of Lake County
Career Group SetID:	<input type="text"/> 	
Facility Group SetID:	<input type="text"/> 	
Academic Career:	ACAD 	Academic
Academic Group:	<input type="text"/> 	
Subject Area:	<input type="text"/> 	
Term:	1081 	Spring 2008
Academic Program:	<input type="text"/> 	
Academic Plan:	<input type="text"/> 	
Academic Sub-Plan:	<input type="text"/> 	

 Save

User Defaults 1 | User Defaults 2 | User Defaults 3 | User Defaults 4 | Enrollment Override Defaults | Communication Speed Keys | User 3C Groups Summary

Note All pages in a component have the same search record, so the prompt in the initial search page will be the same, regardless of which page you access first. Additionally, you will not be prompted to enter new search criteria as you move from page to page in the component.

SAVING DATA IN A COMPONENT

Pages in a component are treated as a single entity when you try to save data. When you save data for a page, data stored on all of the pages in the component will be saved.

Some of the fields in a page may require you to enter data. These are the required data entry fields. If you have forgotten to enter data that is required, the system will prompt you to enter this data. You will not be able to save a record if you have not entered data into the required data entry fields. Required data entry fields will have an asterisk, *, to the left of their field name.

User Defaults 1 User Defaults 2 User Defaults 3 User Defaults 4 Enrollment Override Defaults ▶

User ID:	Name:	
Academic Institution:	<input type="text" value="CLCCC"/> 	College of Lake County
Career Group SetID:	<input type="text"/> 	
Facility Group SetID:	<input type="text"/> 	
Academic Career:	<input type="text" value="ACAD"/> 	Academic
Academic Group:	<input type="text"/> 	
Subject Area:	<input type="text"/> 	
Term:	<input type="text" value="1081"/> 	Spring 2008
Academic Program:	<input type="text"/> 	
Academic Plan:	<input type="text"/> 	
Academic Sub-Plan:	<input type="text"/> 	

 Save

[User Defaults 1](#) | [User Defaults 2](#) | [User Defaults 3](#) | [User Defaults 4](#) | [Enrollment Override Defaults](#) | [Communication Speed Keys](#) | [User 3C Groups Summary](#)

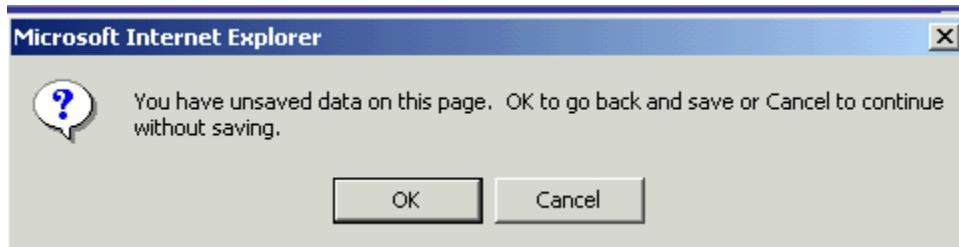
An error message like the following will appear if you try to save your work and have forgotten to enter data into one or more of the required data entry fields. In the message below, two required data entry fields, fields 15 and 30, have been left blank:



After the error message appears, required data entry fields without data, will have a red background in their edit boxes. In the example below, the user forgot to enter data for the Responsible ID field, which is a required data entry.

*Responsible ID:  

The system has some built-in reminders for saving your work. For example, if you attempt to leave a component, by clicking on one of the menu breadcrumbs, without saving your data, you will receive the following message:



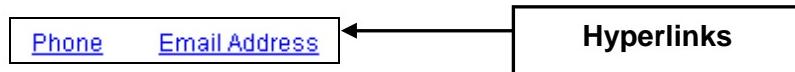
If you do not need to save your data, click the Cancel button on the above screen. Otherwise, click the OK button to return to the data entry screen, and then click the Save button. Most of the time, however, you will not be reminded to save your work. Therefore, try to remember to save your work after you have added or edited any data.

COMPONENTS WITH RELATED LINKS

Occasionally you will encounter pages that, in addition to having links to other pages in the component, have links to related components or pages. You can click on any one of these links to move to the related component, or page, for the record you currently have open. These links allow you to easily move to related components, and to enter or view data, without going through the search process again. There are three kinds of links available:

- **Hyperlinks** – links to other pages in the system
- **Go button**,  – links to a specific area of a page in the system
- **Drop-down list box with the word “...More”** – contains several more transactional links

Below are examples of links found in pages:



and



When you click a hyperlink, you will notice that the new component contains the same links as the original page, enabling you to return to the original component, if desired. The component, or page, in which you are working will appear in black text and is not underlined.

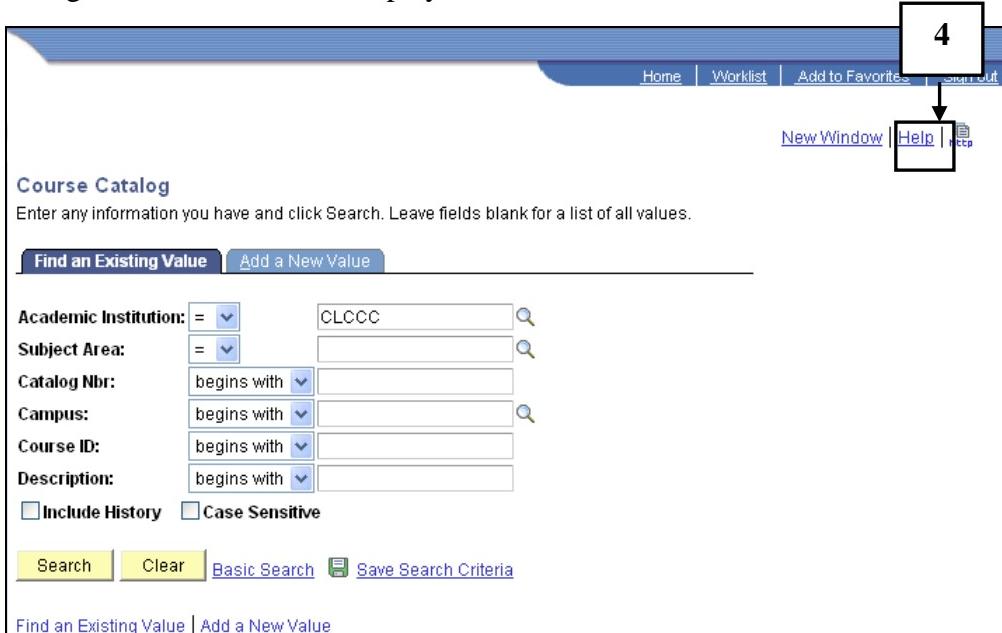
If you click on the “Go” button, , it will take you to another component, where you can view and/or enter data into the system.

4. GETTING HELP

Within the PeopleSoft 9.0 application, you can find documentation to help you. To see the Help link, you will need to navigate to a search page.

1. Click on **Curriculum Management** in the Menu pagelet.
2. Click on the **Course Catalog** menu item in the Menu pagelet.
3. Click on the **Course Catalog** link in the Main Menu pagelet.

The Course Catalog search window will display.



Course Catalog
Enter any information you have and click Search. Leave fields blank for a list of all values.

Academic Institution:	= <input type="button" value="▼"/>	CLCCC <input type="button" value="🔍"/>
Subject Area:	= <input type="button" value="▼"/>	<input type="button" value="🔍"/>
Catalog Nbr:	begins with <input type="button" value="▼"/>	<input type="button" value="🔍"/>
Campus:	begins with <input type="button" value="▼"/>	<input type="button" value="🔍"/>
Course ID:	begins with <input type="button" value="▼"/>	<input type="button" value="🔍"/>
Description:	begins with <input type="button" value="▼"/>	<input type="button" value="🔍"/>

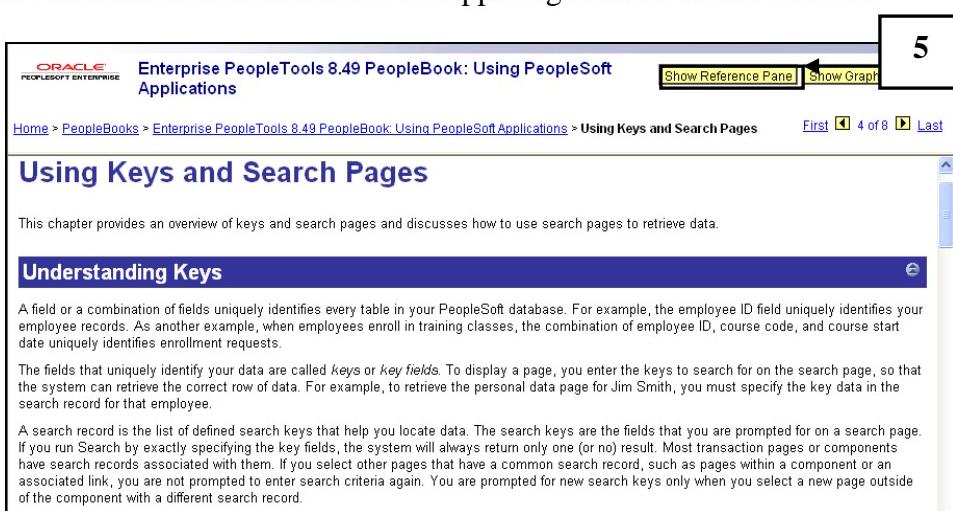
Include History Case Sensitive

[Find an Existing Value](#) | [Add a New Value](#)

4. Click on the **Help** link in the upper right corner of the window.

The PeopleSoft help window will display.

5. Click the **Show Reference Pane** button in the upper right corner of the window.



Enterprise PeopleTools 8.49 PeopleBook: Using PeopleSoft Applications

[Home](#) > [PeopleBooks](#) > [Enterprise PeopleTools 8.49 PeopleBook: Using PeopleSoft Applications](#) > [Using Keys and Search Pages](#) First 4 of 8

Using Keys and Search Pages

This chapter provides an overview of keys and search pages and discusses how to use search pages to retrieve data.

Understanding Keys

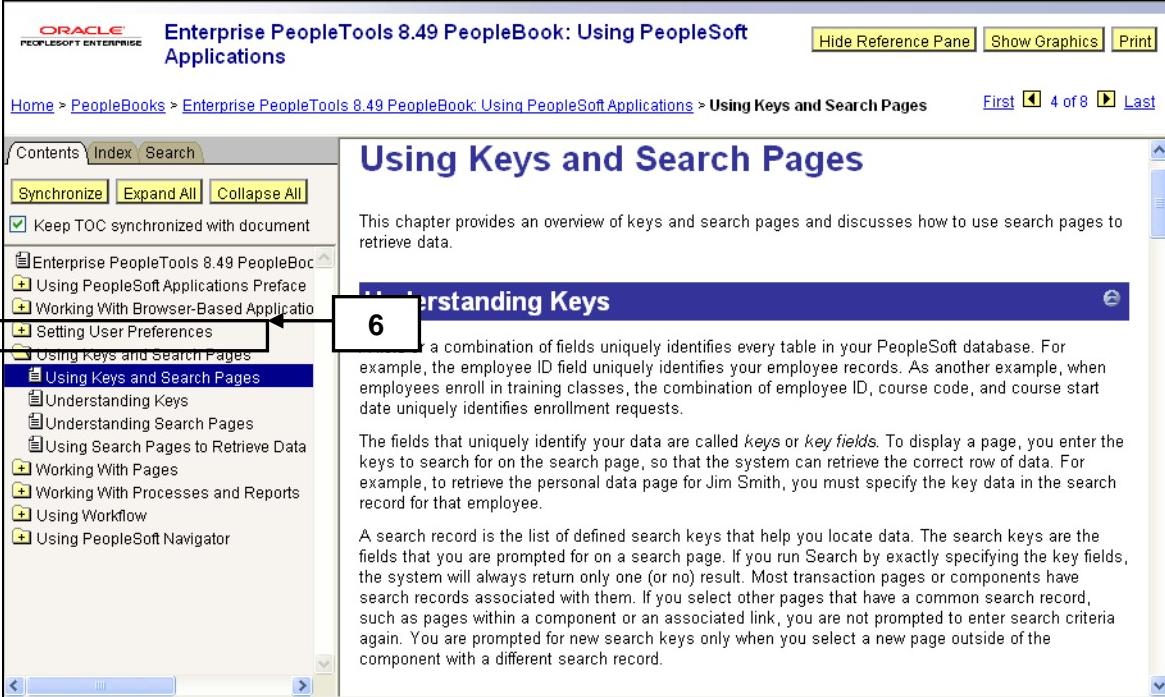
A field or a combination of fields uniquely identifies every table in your PeopleSoft database. For example, the employee ID field uniquely identifies your employee records. As another example, when employees enroll in training classes, the combination of employee ID, course code, and course start date uniquely identifies enrollment requests.

The fields that uniquely identify your data are called *keys* or *key fields*. To display a page, you enter the keys to search for on the search page, so that the system can retrieve the correct row of data. For example, to retrieve the personal data page for Jim Smith, you must specify the key data in the search record for that employee.

A search record is the list of defined search keys that help you locate data. The search keys are the fields that you are prompted for on a search page. If you run Search by exactly specifying the key fields, the system will always return only one (or no) result. Most transaction pages or components have search records associated with them. If you select other pages that have a common search record, such as pages within a component or an associated link, you are not prompted to enter search criteria again. You are prompted for new search keys only when you select a new page outside of the component with a different search record.

The Reference pane displays. This is a table of contents which can be used to look up specific help topics.

6. Click on Setting User Preferences.

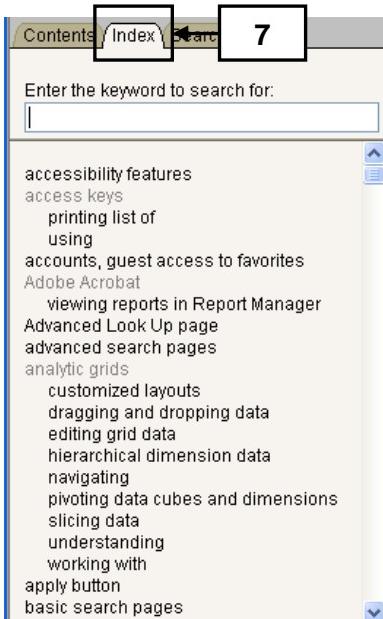


The screenshot shows the Oracle PeopleTools 8.49 PeopleBook: Using PeopleSoft Applications help system. The title bar reads "Enterprise PeopleTools 8.49 PeopleBook: Using PeopleSoft Applications". The top menu has options like "Hide Reference Pane", "Show Graphics", and "Print". Below the menu, the breadcrumb navigation shows "Home > PeopleBooks > Enterprise PeopleTools 8.49 PeopleBook: Using PeopleSoft Applications > Using Keys and Search Pages". On the right, there are buttons for "First", "4 of 8", and "Last". The main content area is titled "Using Keys and Search Pages". It contains a brief introduction: "This chapter provides an overview of keys and search pages and discusses how to use search pages to retrieve data." Below this, a section titled "Understanding Keys" is expanded, with a callout box labeled "6" pointing to its title. The text in this section explains that a combination of fields uniquely identifies every table in the PeopleSoft database. It gives examples like employee ID for employees and combinations of employee ID, course code, and start date for enrollment requests. It also defines "keys or key fields" as fields used to identify data, and "search records" as lists of search keys. The left sidebar contains a table of contents with several sections expanded, including "Setting User Preferences" which is highlighted with a callout box labeled "6". Other sections listed include "Using Keys and Search Pages", "Understanding Keys", "Understanding Search Pages", "Using Search Pages to Retrieve Data", "Working With Pages", "Working With Processes and Reports", "Using Workflow", and "Using PeopleSoft Navigator".

The Setting User Preferences folder expands. You could continue drilling down in the table of contents until you can find a topic of interest.

There are two other ways to search for information in the PeopleSoft help system.

7. Click on the **Index tab** at the top of the window.



The screenshot shows the Oracle PeopleTools 8.49 PeopleBook: Using PeopleSoft Applications help system with the "Index" tab selected. The top menu bar includes "Contents", "Index", and "Search". A callout box labeled "7" points to the search input field. Below the menu, there is a search bar with the placeholder text "Enter the keyword to search for:" followed by a search icon. The main content area displays a list of search results, which include various PeopleSoft terms and concepts such as "accessibility features", "access keys", "printing list of", "using", "accounts, guest access to favorites", "Adobe Acrobat", "viewing reports in Report Manager", "Advanced Look Up page", "advanced search pages", "analytic grids", "customized layouts", "dragging and dropping data", "editing grid data", "hierarchical dimension data", "navigating", "pivoting data cubes and dimensions", "slicing data", "understanding", "working with", "apply button", and "basic search pages".

An alphabetical index of keywords (or topics) appears. You can scroll through the list or simply type a keyword into the Search prompt.

8. Type **Searching** in the keyword prompt.

The window will automatically scroll down to the area of interest.

Note PeopleBooks Help may *not* take you to the exact reference because of the CLC customization of PeopleSoft 9.0.

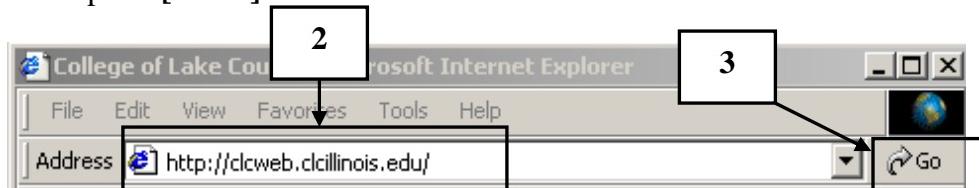
You'll receive the message "No content available" and then be returned to a more general high-level help page instead.

FERPA (FAMILY EDUCATIONAL RIGHTS AND PRIVACY ACT)

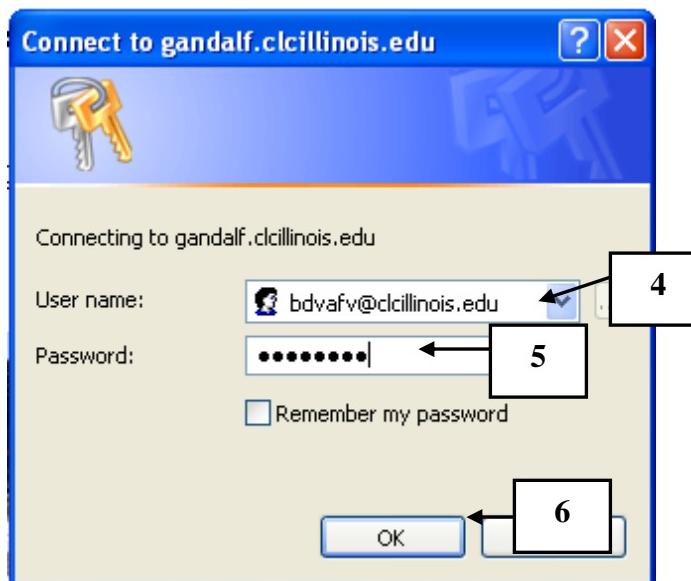
The College of Lake County is legally obligated to protect the privacy of its students in compliance with the Family Education Rights and Privacy Act (FERPA). CLC offers on-line training in FERPA.

To access the on-line FERPA training:

1. Bring up **Internet Explorer**. You can click on the Internet Explorer icon, , in your taskbar.
2. Type **http://clcweb.clcillinois.edu**.
3. Press the **Go** button or press **[Enter]**.



4. Type in your **Network User Name** followed by @clcillinois.edu and press **[Tab]**.
5. Type in your **Network Password** and press **[Tab]**.
6. Click on the **OK** button or press **[Enter]**.



The CLC Intranet page will appear.

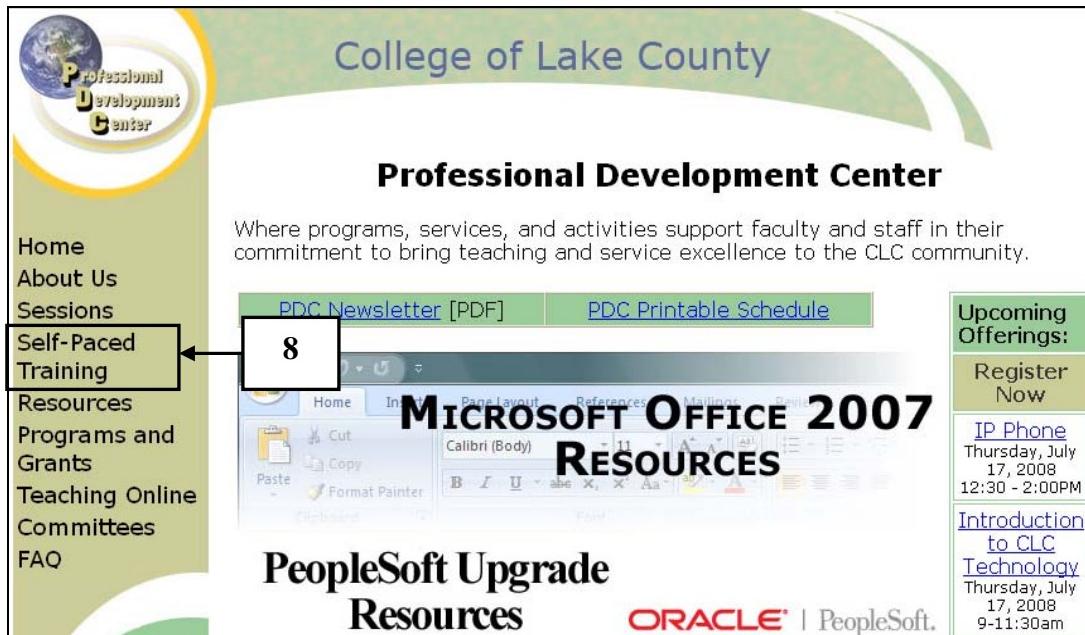
7. Click on the **Professional Development Center** link.



The screenshot shows the CLC Intranet homepage. At the top, there is a navigation bar with links to Departments, Divisions & Disciplines, Directory, Governance, and the CLC Public Web Site. Below this is a section titled "Faculty & Staff Resources" which includes links to various administrative systems like Student Administration & Human Resources, Finance System, and PeopleBooks. Further down, there are links for Outlook Email Web Access and Document Imaging. A section for Grayslake Campus Events is also present. On the right side of the page, there is a sidebar with links to Professional Development, Academic Quality Improvement Program (AQIP), and a "Search Intranet" field. A callout box labeled "7" points to the "Professional Development Center" link in the sidebar.

The Professional Development home page will appear.

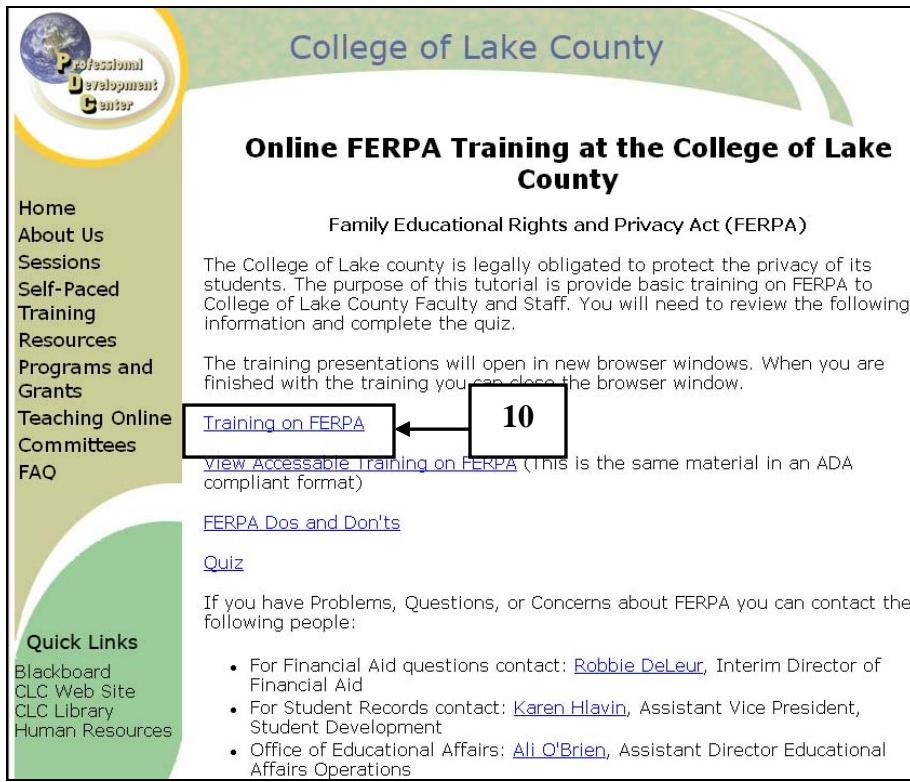
8. Click on the **Self-Paced Training** link on the left side of the page.



The screenshot shows the Professional Development Center homepage. At the top, there is a banner for the College of Lake County. Below it, the title "Professional Development Center" is displayed. A sub-section titled "Where programs, services, and activities support faculty and staff in their commitment to bring teaching and service excellence to the CLC community." is shown. On the left side, there is a sidebar with links to Home, About Us, Sessions, Self-Paced Training, Resources, Programs and Grants, Teaching Online, Committees, and FAQ. A callout box labeled "8" points to the "Self-Paced Training" link in the sidebar. The main content area features a Microsoft Office 2007 ribbon with the text "MICROSOFT OFFICE 2007 RESOURCES". At the bottom, there is a section for "PeopleSoft Upgrade Resources" and the Oracle logo. To the right, there is a sidebar for "Upcoming Offerings" with a "Register Now" button and two event details: "IP Phone" on Thursday, July 17, 2008, 12:30 - 2:00PM, and "Introduction to CLC Technology" on Thursday, July 17, 2008, 9-11:30am.

9. Select FERPA.

The online FERPA Training page will appear.



College of Lake County

Online FERPA Training at the College of Lake County

Family Educational Rights and Privacy Act (FERPA)

The College of Lake county is legally obligated to protect the privacy of its students. The purpose of this tutorial is provide basic training on FERPA to College of Lake County Faculty and Staff. You will need to review the following information and complete the quiz.

The training presentations will open in new browser windows. When you are finished with the training you can close the browser window.

[Training on FERPA](#) ← **10**

[view Accessible Training on FERPA](#) (This is the same material in an ADA compliant format)

[FERPA Dos and Don'ts](#)

[Quiz](#)

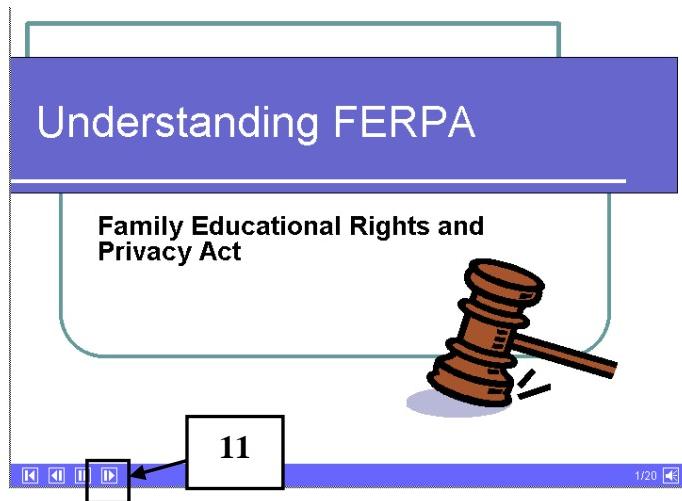
If you have Problems, Questions, or Concerns about FERPA you can contact the following people:

- For Financial Aid questions contact: [Robbie DeLeur](#), Interim Director of Financial Aid
- For Student Records contact: [Karen Hlavin](#), Assistant Vice President, Student Development
- Office of Educational Affairs: [Ali O'Brien](#), Assistant Director Educational Affairs Operations

10. Click on the **Training on FERPA** link.

The FERPA training program will display.

11. Click on the forward button to advance through the program.



Understanding FERPA

Family Educational Rights and Privacy Act



11

5. OPENING A NEW WINDOW

NEW WINDOW FUNCTION

In the upper right-hand corner of each page in a component, you will notice the New Window link. The New Window function allows you to open a second session in the system. By opening a new window you can keep the current component active (without having to close out of it) and have a second component, or a second session of the same component, open at the same time.

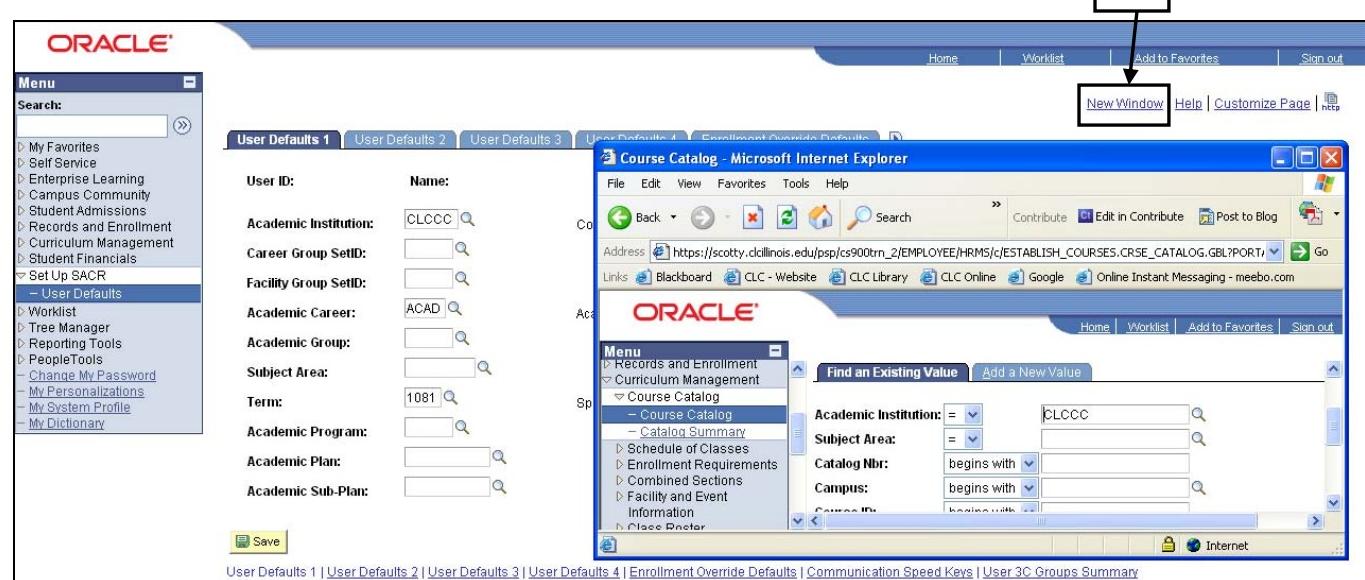
For example, in the screen below, we have both the User Defaults and Course Catalog search windows open at the same time. To open both windows:

1. Access the **User Defaults** component first.

The menu options are Set Up SACR/User Defaults.

2. Click on the **New Window** link, and
3. Access the **Course Catalog search window**.

The menu options are Curriculum Management/Course Catalog.



The screenshot shows the Oracle PeopleSoft interface with two windows open. The main window is titled "User Defaults" (component: User Defaults 1) and displays various user default settings. The secondary window is titled "Course Catalog" (component: Enrollment Overrides Defaults) and displays course catalog search criteria. A callout box labeled "2" points to the "New Window" link in the top right corner of the User Defaults window, indicating the action to open a second session.

Now both components are open at the same time. From this point, you can view, or enter data, in each of the open components.

TIPS FOR USING THE NEW WINDOW FUNCTION

Here are some guidelines for using the New Window function:

- **Before opening a new window, save any changes** you have made in the current window. If the session times out while you are working in a new window, you may lose any unsaved changes.
- **Use the New Window function only once** to open up one additional new window. Do not continue opening new windows after you already have two windows open.
- To be on the safe side, **it may be better for you to open another session of your browser**, in order to open more than one component at a time (e.g. open a second session of Internet Explorer and log on, then open the second component you would like to access).
- **Once you have finished using a second component, close this window** using the browser menus, File/Close, or click the close button, , in the upper right-hand corner of the window you would like to exit. This should be done because after 30 minutes of inactivity, in a second open window, your new window session will timeout or expire. This does not invalidate your other, current window, but simply means this expired window is no longer useable. Any unsaved changes in this second window, however, will be lost.

! Warning ! Do not use your browser's menu commands File/New/Window feature. Doing so merely copies the current HTML code from the parent window, rather than opening a new system-maintained window session.



6. IDENTIFYING TYPES OF DATA ENTRY ELEMENTS

On some pages you will see several types of data entry elements. All of the different kinds of data entry elements serve a common purpose – to provide you with a simple way to enter and update data in the system. You can type directly into some data entry elements, such as edit boxes. Other data entry elements, such as radio buttons and drop-down lists, require you to select a value from a list of choices. Understanding how to use each type of data entry element will help you to use the system more effectively.

TYPES OF DATA ENTRY FIELDS

Data entry elements that are associated with specific database fields include the following:

Field Type	Description
Check Box or	Small, square box that enables or disables an option. Typically, you select the check box by clicking within it. When you click an empty check box, a check mark appears in the box, , indicating that the option has been enabled. To clear the option, simply re-click in the check box, and the check mark will disappear, , indicating that the option has been disabled. <i>Note:</i> Use your spacebar to check and uncheck a check box.
Drop-Down List Box 	Rectangular box, similar to an edit box. However, the box will have a down arrow button, , within the box. Clicking the down arrow button will expand the box to display a list of valid values from which you can select a single option. <i>Note:</i> Typing the first character, or set of characters, of a value in a drop-down list box, will take you to an item in the list that begins with that character(s).
Edit Box 	Rectangular box for entering data. Each field in the system is formatted to accept a maximum number of characters. Therefore, the size of the edit box provides a visual clue about the number of characters that can be entered.
	Some edit boxes have lookup tables associated with them. These edit boxes have a magnifying glass icon, , to the right of them. The magnifying glass indicates that there is a predefined list of valid entries for a given field.
Date Box 	Rectangular box with a calendar to the right of it. Click on the calendar icon to view an on-line calendar. Next, click on the proper date to select it.
Long Edit Box 	Long rectangular box into which you enter long, free-form text items, such as comments. Clicking on the up and down arrows within the box allows you to view additional lines of text that do not fit in the box.



Field Type	Description						
Radio Button <input checked="" type="radio"/> or <input type="radio"/>	Small round button that represents one option in a group of mutually exclusive options. Click to select the desired option; only one radio button in the group can be selected at a time. A dot in the middle of a radio button indicates that option is active. <i>Note:</i> The spacebar can be used to select and unselect radio buttons.						
Search Results Lists Search Results View All First 1 of 1 Last <table><thead><tr><th>Campus Description</th><th>Short Description</th><th>Location Code</th></tr></thead><tbody><tr><td>CLC</td><td>College of Lake County</td><td>GLC</td></tr></tbody></table>	Campus Description	Short Description	Location Code	CLC	College of Lake County	GLC	An area where fields are displayed in a table, with a navigation bar. These fields are read-only, and clicking on any field in a given row will take you to the selected record.
Campus Description	Short Description	Location Code					
CLC	College of Lake County	GLC					

REQUIRED DATA ENTRY FIELDS

An asterisk in front of a data entry field, *, indicates that the field is a required data entry field. Below is an example of a required data entry field:

*Accommodation ID:

The asterisk to the left of the field name indicates that you must enter data into the field if you want to save the data in that component. Whenever, you attempt to save a record, where you have failed to enter data into one or more required data entry fields, a message will appear:



In the message above, we can see that two different fields, fields 15 and field 30, are required data entry fields. When this message appears, click OK. You will return to the original data entry screen. Required data entry fields not completed will appear with a red background fill in the edit box:

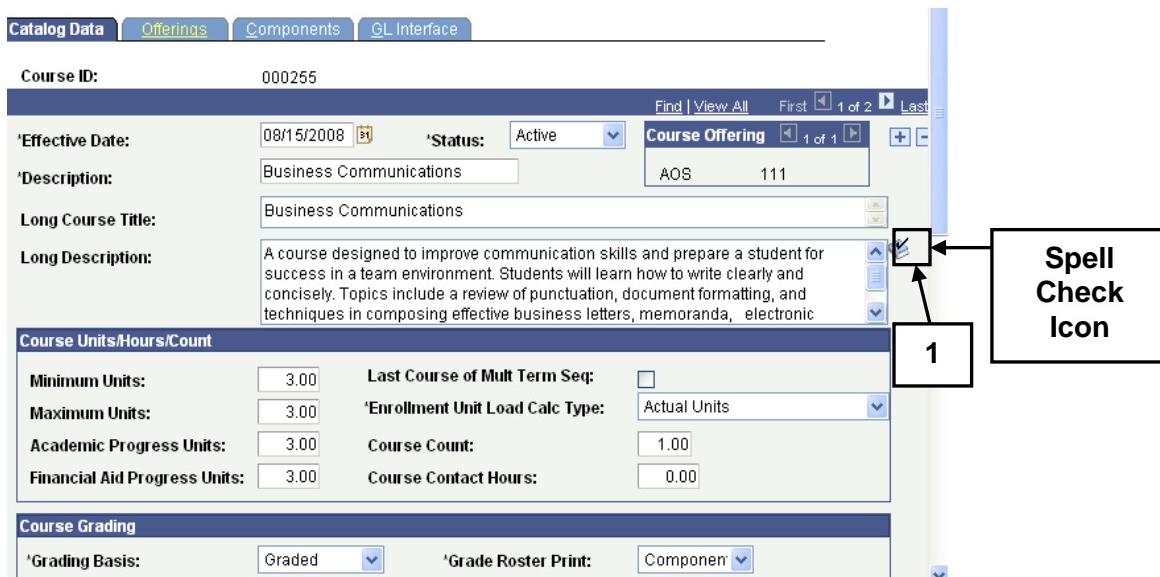
*Responsible ID:

You must then enter data into all of the required data entry fields in order to save the record.

7. NEWER FEATURES

USING SPELL CHECKING

A course will display and the Catalog Data tab will be active. You will see a new icon for spell checking,  . It can be found on the right side of some fields. For example, the Spell Check icon is available for the Long Description field in the Course Catalog component.



The screenshot shows the PeopleSoft Catalog Data interface. At the top, there are tabs: Catalog Data (selected), Offerings, Components, and GL Interface. Below the tabs, the Course ID is listed as 000255. The 'Long Description' field contains the text: "A course designed to improve communication skills and prepare a student for success in a team environment. Students will learn how to write clearly and concisely. Topics include a review of punctuation, document formatting, and techniques in composing effective business letters, memoranda, electronic". To the right of this field is a small blue square icon with a white checkmark and a pencil, labeled 'Spell Check Icon' with a callout box and number 1. Above the 'Long Description' field, there is a 'Course Offering' section showing AOS 111. At the bottom of the screen, there is a 'Course Grading' section.

1. Click on the **Spell Check** icon to the right of the Long Description field.

The following window will appear, since there are no spelling errors. If there had been errors, you would have had the opportunity to change these errors. This is a very handy tool when you are entering or editing data in PeopleSoft.



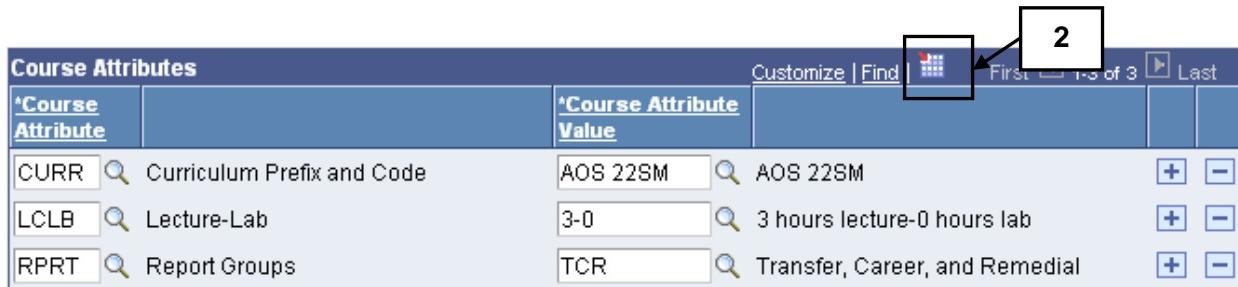
2. Click **OK**.

USING THE DOWNLOAD TO EXCEL FUNCTION

There is a new function in PeopleSoft 9.0 that allows you to download data from PeopleSoft into another program, such as Excel.

1. Scroll down in the Course Catalog window to the **Course Attributes** area.

In the Course Attributes title bar, you will see the download icon,  . This function is available for some groups in PeopleSoft. For example, the download icon is available for both Course Attributes and Course Topics in the Course Catalog component of PeopleSoft 9.0.



Course Attributes		
*Course Attribute	'Course Attribute Value	
CURR	AOS 22SM	
LCLB	3-0	
RPRT	TCR	

2. Hold down your **Ctrl** key and then press the **download** icon.

Note If the download function does not work, you will need to turn it on using the My Personalizations link in the main menu. Refer to pages 7-1 and 7-2 for help with this.

The File Download window displays as seen below.



3. Click the **Open** button.

The Security Alert window may display.

4. Click the Yes button.



USING GRID TABS

Grid Tabs are located at the top of a search screen. The shaded (or darker) tab is always the active one. By default the “Find an Existing Value” tab will be active.

1. Return to the Course Catalog search screen.



Find an Existing Value Add a New Value

Academic Institution: = CLCCC

Subject Area: = AOS

Catalog Nbr: begins with 111

Campus: begins with CLC

Course ID: begins with 000255

Description: begins with

Include History Case Sensitive

Search Clear Basic Search

You will see two tabs at the top of the window as seen below.



2. Click on the Add a New Value tab.

A new screen will appear.

3. Click the **Add** button.

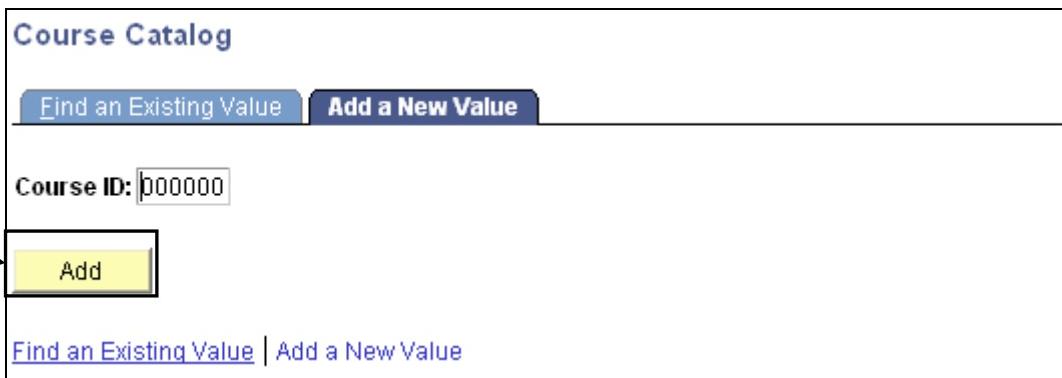
Course Catalog

[Find an Existing Value](#) | **Add a New Value**

Course ID: 000000

3 → **Add**

[Find an Existing Value](#) | [Add a New Value](#)



The Course Catalog data entry screen will appear. If you wanted to add a new course to the catalog, you would fill in the necessary prompts and then click the Save button,  at the bottom of the page to save your work.

Note: You would want to run Spell Checker on any new fields having this feature.

[Catalog Data](#) | [Offerings](#) | [Components](#) | [GL Interface](#)

Course ID: 000000

'Effective Date: 07/02/2008  'Status: Active

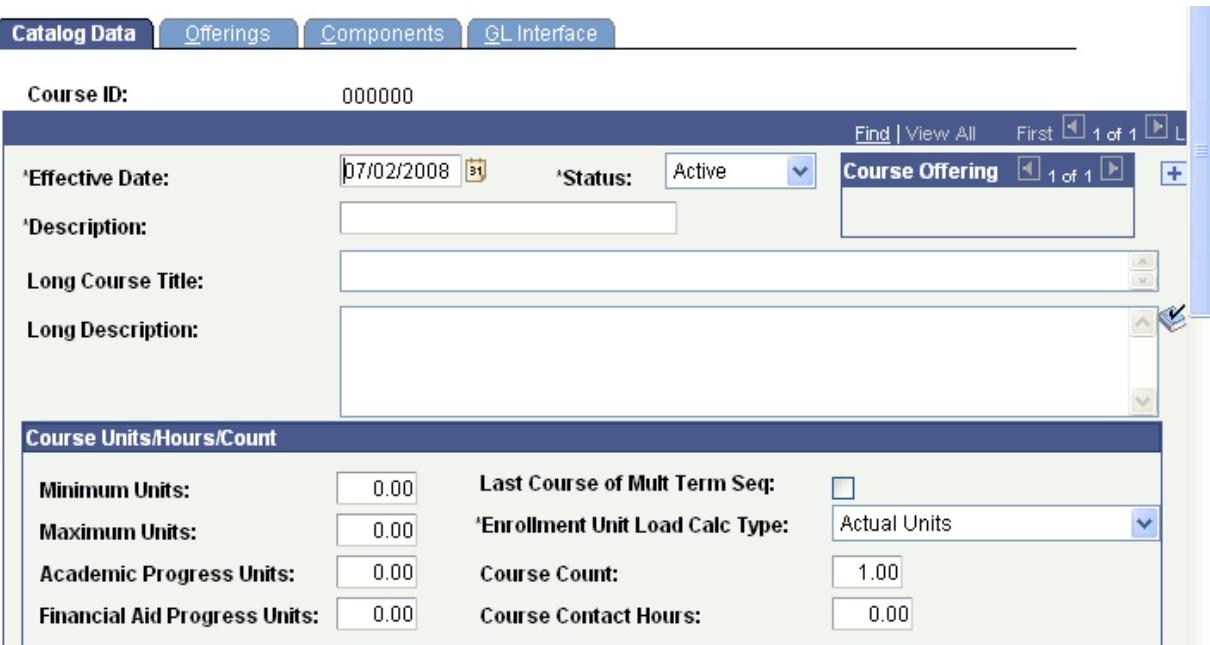
'Description: 

Long Course Title: 

Long Description: 

Course Units/Hours/Count

Minimum Units:	0.00	Last Course of Mult Term Seq:	<input type="checkbox"/>
Maximum Units:	0.00	'Enrollment Unit Load Calc Type:	Actual Units
Academic Progress Units:	0.00	Course Count:	1.00
Financial Aid Progress Units:	0.00	Course Contact Hours:	0.00



Note You would want to run Spell Check on any new fields in which you've entered data that have .



USING NOTIFY BUTTON

The Notify button appears on many pages throughout PeopleSoft 9. It takes you directly to an e-mail page, thus making it easier to communicate with staff, faculty, or a student about any action just performed on that PeopleSoft page.

For example, if you've changed a student's primary e-mail address (per their request), you can then confirm the change in the e-mail by using the Notify button at the bottom of the Contact Information page. There isn't any need to transfer to CLC's e-mail system to accomplish this notification.

The screenshot shows the 'Contact Information' page with several sections: 'Addresses', 'Phone', and 'Email'. At the bottom left, there is a 'Notify Button' highlighted with a black box and an arrow pointing to the 'Notify' button in the toolbar below. The toolbar also includes 'Save', 'Refresh', and other actions like 'Add', 'Update/Display', 'Include History', and 'Correct History'.

Note PeopleSoft 9.0's e-mail function is intended for use when communicating specifically about PeopleSoft-related information / actions. Otherwise, continue to use CLC's e-mail system.

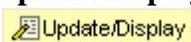
8. USING PAGE ACTIONS TO VIEW DATA

PAGE ACTION BUTTONS

The system comes with a number of page actions buttons, which are located at the bottom right-hand corner of some pages. Depending on the function you trying to execute in the system, all, some combination, or none of the page action buttons will appear. These page action buttons appear when you:

- retrieve rows in a table,
- modify rows in a table, or
- insert rows in a table.

Pressing any one of the buttons serves to apply specific rules to the data, based on the effective date. The button selected will dictate whether you can access certain fields, and what you can do with each type of row. The table below provides information on each of the page action buttons.

Page Action Button	Views Available	Changes	Insert New Rows
 Update/Display	Current and Future	Future only. Will not include a historical record for the data.	Can use this option when the effective-date is greater than or equal to the current row.
 Include History	History, Current and Future	Future only. Will create a history for the record.	Can use this option when the effective-date is greater than or equal to the current row.
Correction	History, Current, Future	All existing rows. Will update the historical record to reflect changes.	When using this option, there will be no effective-date restrictions. Note: Access to this function is security dependent.

You can toggle between page action buttons by clicking on them, or by using the [Alt]+\ key combination on your keyboard, and then by pressing [Enter] to activate the selected button.

Sometimes, these page actions will appear as check boxes on a search page rather than as buttons. Here are examples of check box page action options:

- Include History**
 Correct History

When these check boxes are present in a search page, you can simply click in the check box to select one of these options. A checkmark will appear, if the option has been selected, as in:

- Include History**

Activating one of these check boxes in a search page is exactly the same as clicking on the corresponding page action button at the bottom of a component page. For example, activating the **Include History** checkbox,  **Include History**, in a search page is the same as clicking on the **Include History** button,  , at the bottom of a component page.

EFFECTIVE DATES

The use of effective-dates in the system allows for:

- storage of historical data,
- viewing of changes in data over time and
- entry of future data.

For example, you may want to track several events in the career of a student, such as:

- the date they applied for admission,
- when they were accepted, and
- when they graduated.

When any data is added to the system, an historical record for each entry is maintained in the system. This provides an audit trail for all additions and changes in the system.

When editing is done to records in the system, the original data is retained in the system. The new data is added to the system along with an effective date (when the information will go into effect). In this manner changes made to a record can be tracked over time.

Effective-dated rows are categorized into the following basic types:

Types of Effective-Dating	Description
Current	The data row with the date closest to, but not greater than, the system date. Note: Only one row can be the current row.
History	Data rows that have effective dates earlier than the current data row.
Future	Data rows that have effective dates later than the system date.



9. USING THE SEARCH FUNCTION

Once you have selected the menu items required to move to the desired area of the system, a search page will display. You must use search pages in order to locate system data. Therefore, you must understand how to use the various search functions in the system.

USING SEARCH CRITERIA

Searches can be conducted on a single or multiple database fields. If you would like to use a single field for your search, you will use a basic search page. If, on the other hand, you would like to use some combination of fields for your search, you will use an advanced search page.

Each component has a search record, which is a list of defined search fields that can be used to help you locate data in a given component. We will access the following menus to move to the Course Catalog component:

- Curriculum Management
- Course Catalog

In the basic search page below for courses, only one field in the search record is required, Academic Institution. The other fields, Subject Area, Catalog Nbr, Campus, Course ID, and Description are optional.

BASIC SEARCH PAGE

Course Catalog
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

Academic Institution:	= <input type="button" value="▼"/>	<input type="text" value="CLCCC"/> <input type="button" value="🔍"/>
Subject Area:	= <input type="button" value="▼"/>	<input type="text"/> <input type="button" value="🔍"/>
Catalog Nbr:	begins with <input type="button" value="▼"/>	<input type="text"/> <input type="button" value="🔍"/>
Campus:	begins with <input type="button" value="▼"/>	<input type="text"/> <input type="button" value="🔍"/>
Course ID:	begins with <input type="button" value="▼"/>	<input type="text"/> <input type="button" value="🔍"/>
Description:	begins with <input type="button" value="▼"/>	<input type="text"/> <input type="button" value="🔍"/>

Include History **Case Sensitive**

Search **Clear** **Basic Search** **Save Search Criteria**

[Find an Existing Value](#) | [Add a New Value](#)

This search will locate all courses offered at the College of Lake County.

To conduct a more detailed search, you could add the Subject Area to the Search page or any combination of fields in the search record.

To conduct a search:

1. Using the menus, **move to the component for which you would like to conduct your search.**
2. **Enter a full, or partial, value for the search field(s) you would like to base your search upon.**
3. **Press the search button, or press [Enter].**

Course Catalog
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

Academic Institution:	=	CLCCC	Search Criteria Entered
Subject Area:	=	AOS	
Catalog Nbr:	begins with	112	
Campus:	begins with		
Course ID:	begins with		
Description:	begins with		
<input type="checkbox"/> Include History		<input type="checkbox"/> Case Sensitive	
3	Search	Clear	Basic Search Save Search Criteria

The system automatically begins searching the database for entries meeting the criteria, and will provide you with a list of possible matches; or, if there is only a single match, the page you requested.

In the example above, we want to look up all Automated Office Technologies (AOS 112 classes) offered at CLC.

When the search results display, there will be an indicator of the number of results meeting your criteria. In the example below, we have located 2 courses meeting our criteria.

Search Results

[View All](#) [First](#) **1-2 of 2** [Last](#)

Academic Institution	Subject Area	Catalog Nbr	Campus	Course ID	Description
CLCCC	AOS	112	CLC	004748	Automated Office Technologies
CLCCC	AOS	112	CLC	004748	ComputerBasics/Software Apps

4. To see additional information on the first class, simply click on any one of the hyperlinks (CLCCC, AOS, 112, CLC, 004748, or Automated Office Technologies) in the first row.

SEARCHES USING FIELD-LEVEL PROMPTS AND VALIDATION

Some fields in search pages are linked to lookup tables in the system. These lookup tables contain a list of valid entries for a given field. For example, if we want to look up courses based on the Subject Area field, there are only a limited number of subject areas. As such, they are stored in a lookup table. Lookup tables are necessary, then, to ensure that data stored within the system is valid.

In a search page, fields with associated lookup tables will have a magnifying glass, , to the right of the associated edit box. For example, in the screen below the display fields, Academic Institution, Subject Area, and Campus, all have lookup tables associated with them.

To conduct a search using fields having associated lookup tables:

1. Using the menus, **move to the component for which you would like to conduct your search.**
2. Click on the **magnifying glass to the right of the field(s) on which you would like to conduct your search.**

Course Catalog
Enter any information you have and click Search. Leave fields blank for a list of all values.

Academic Institution:	= <input type="button" value="▼"/>	CLCCC 
Subject Area:	= <input type="button" value="▼"/>	AOS 
Catalog Nbr:	begins with <input type="button" value="▼"/>	112
Campus:	begins with <input type="button" value="▼"/>	
Course ID:	begins with <input type="button" value="▼"/>	
Description:	begins with <input type="button" value="▼"/>	

Include History Case Sensitive

Clicking on the magnifying glass, , to the right of any of edit boxes (or by pressing [Alt]+5 while in an edit box with an associated lookup table), will produce a lookup screen. For example, if we click on the magnifying glass to the right of Subject Area, the following screen will appear:

Look Up Subject Area

Academic Institution:	CLCCC
Subject Area:	begins with <input type="button" value="▼"/> 
Academic Organization:	begins with <input type="button" value="▼"/> 
Description:	begins with <input type="button" value="▼"/> 



In addition to the Look Up Subject Area at the top of the screen, we have a list of the first 300 subject areas in the system. A list of valid entries for the field will appear. In this case we can see a partial list of the terms located in the system. This screen shot below represents only the first 24 entries in the search list.

Search Results		
Only the first 300 results can be displayed. Enter more information above a		
View All	First	1-100 of 300 Last
Subject Area	Academic Organization	Description
ABE	ACEDV	ABE - Adult Basic Education
ABR	EGRDV	ABR - Automotive Collision Rep
ACC	BUSDV	ACC - Accounting
ACR	EGRDV	Air Condition & Refrigeration
ADE	ACEDV	ADE - Adult Education
ADET	ACEDV	ADET - Adult Education Trainin
AEPD	ACEDV	Adult Ed. Prof. Development
AGR	BIDOV	Agriculture
AIB	BUSDV	Finance & Credit
ANT	SOCDV	ANT - Anthropology
AOS	BUSDV	AOS - Administrative Office Sy
ARA	COMDV	ARA - Arabic
ARC	EGRDV	ARC - Architectural Technology
ART	COMDV	ART - Art
AST	EGRDV	AST - Astronomy
AUT	EGRDV	AUT - Automotive Technology
BCT	EGRDV	BCT - Building Construction Te
BIO	BIDOV	BIO - Biology
BSS	BUSDV	BSS - Administrative Office Sy
BUS	BUSDV	BUS - Business Administration
CAD	EGRDV	CAD - Computer Aided Design
CALH	ACEDV	Continuing-Allied Health
CAVO	EDAFF	CAVO - Avocations
CBA	ACEDV	Basset

We will narrow down the search by specifying a subject area that begins with the letter “F” as seen below.

Look Up Subject Area

Academic Institution: CLCCC

Subject Area: begins with

Academic Organization: begins with

Description: begins with

[Basic Lookup](#)



The search results have now been narrowed down to a list of six entries.

Search Results		
View All		First < 1-6 of 6 > Last
Subject Area	Academic Organization	Description
FLU	EGRDV	Fluid Power Technology
FPT	EGRDV	Fire Protection Technology
FRN	COMDV	FRN - French
FSH	BUSDV	Fashion Merchandising
FSM	BUSDV	FSM - Food Service
FST	SOCDV	FST - Fire Science Technology

- Click on any of the hyperlinks in the row of the value you would like to use for your search.

Tip If you know the value to be used for a specific field with an associated lookup table, you may type it directly into the edit box. However, you must enter a valid entry. For example, in the previous search, we could type in a value of “FSM” for Subject Area to search for Food Service courses.

USING SEARCH OPERATORS

To navigate to any of the components in PeopleSoft 9.0 you must first conduct a search. Each search screen includes a list of search fields along with a list of operators. In the Course Catalog search screen below, you will see six search fields as well as specific operators associated with the fields.

Course Catalog
Enter any information you have and click Search. Leave fields blank for a list of all values.

Academic Institution: =

Subject Area: =

Catalog Nbr: begins with

Operators

Course ID: begins with

Description: begins with

Include History **Case Sensitive**

[Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Search Fields



The default operator will display for each field. You can change the operator by simply clicking the down arrow to the right, , and selecting a different option. For example, clicking the down arrow to the right of the equal sign (=) brings up a set of two options, = or in; or clicking the down arrow to the right of “begins with” brings up a list of ten options.

The table below includes a list of operators along with descriptions and examples of each.

Operator	Description	Example
in	Allows you to enter two or more values for a field. The values must be comma-delimited.	in CIT,AOS, would locate all course with a subject area or CIT or AOS
begins with	Allows you to enter the first one, two, three, etc. values for a field.	begins with 12, would locate all values beginning with the numbers 1 and 2 in succession
contains	Allows you to enter any part of a field.	contains a, would locate any values having the letter “a” anywhere in the value
=	Must enter an exact match for a field.	=CIT
not=	Allows you to enter a value to be eliminated from the list of possible values	Not= CIT
<	The less than operator should be used on fields containing numbers and will return values less than the specified value.	< 345
<=	The less than or equal to operator should be used on fields containing numbers and will return values lower than or equal to the specific value.	<= 655
>	The greater than operator should be used on fields containing numbers and will return values greater than the specified value.	>543
>=	The greater than or equal to operator should be used on fields containing numbers and will return values higher than or equal to the specified value.	>=321
between	The between operator should be used on fields containing numbers and will allow you to specify a starting number and ending number. The result will include both numbers specified along with any between the specified values.	Between 36 and 45, would locate all values equal to 36 and 45 as well as all values in between.



The Academic Institution prompt defaults to CLCCC, which is the only valid entry for this field.

1. Click on the **down arrow**, , to the right of the Subject Area: prompt.
2. Select **in**.

Course Catalog
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

Academic Institution:	= 	1 & 2		3
Subject Area:	in 	4		
Catalog Nbr:	begins with 			
Campus:	begins with 			
Course ID:	begins with 			
Description:	begins with 			

Include History Case Sensitive

Search **Clear** **Basic Search**  **Save Search Criteria**

The “in” operator allows you to select a list of valid values rather than a single value.

3. Click in the **Subject Area: prompt**.
4. Type: **CIT,AOS**.

Course Catalog
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

Academic Institution:	= 	CLCCC		4
Subject Area:	in 	CIT,AOS		
Catalog Nbr:	begins with 			
Campus:	begins with 			
Course ID:	begins with 			
Description:	begins with 			

Include History Case Sensitive

Search **Clear** **Basic Search**  **Save Search Criteria**

Using the “in” operator, you can conduct searches involving more than one value for a field. In this case we are searching for all Computer Information Technology and Administrative Office Systems classes. When using the “in” operator, you must use only valid entries for the field and must delineate the values with commas.

Note Defaults, like CLCCC, are set by the user in User Defaults. If not set, the user has more repetitive input to do each day. (See Setting User Defaults section of this manual for more information on setting user defaults.)

SAVING SEARCH CRITERIA

Once you have conducted a search, you may want to save it for future use.

1. Click the **Save Search Criteria** hyperlink.

Course Catalog
Enter any information you have and click Search. Leave fields blank for a list of all values.

Academic Institution: =

Subject Area: in

Catalog Nbr: begins with

Campus: begins with

Course ID: begins with

Description: begins with

Include History Case Sensitive

1

The Save Search As window appears as seen below.

Save Search As

Name the search and then click Save.

Name of Search: Course Catalog AOS and CIT 2 & 3

The saved search will contain these values:

Academic Institution: = CLCCC
Subject Area: in AOS,CIT
Catalog Nbr: begins with
Campus: begins with
Course ID: begins with
Description: begins with

4

2. Click in the **Name of Search:** prompt.
3. Type **Course Catalog AOS and CIT**.
4. Click the **Save** button.

The Save Search As window display.

Save Search As

Search saved as Course Catalog AOS and CIT.

[Return to Advanced Search](#)

5

- Click the **Return to Advanced Search** hyperlink.

At the top of the Course Catalog window will be a Use Save Search: prompt. Your saved search, Course Catalog AOS and CIT, will be in the prompt whenever you enter the Course Catalog component.

Course Catalog
Enter any information

Saved Search Name

Find an Existing Value | Add New Value

Use Saved Search: Course Catalog AOS and CIT

Academic Institution: CLCCC

Subject Area: AOS,CIT

Catalog Nbr:

Campus:

Course ID:

Description:

Include History Case Sensitive

Saved Search Criteria

6 → **Search** **Clear** **Basic Search** **Save Search Criteria** **Delete Saved Search**

- To run the search, press **Enter** or click the **Search** button.

A search result list will display, as seen below.

Search Results

View All First 1-76 of 76

Academic Institution	Subject Area	Catalog Nbr	Campus	Course ID	Description
CLCCC	AOS	111	CLC	000255	Business Communications
CLCCC	AOS	112	CLC	004748	Automated Office Technologies
CLCCC	AOS	112	CLC	004748	ComputerBasics/Software Apps
CLCCC	AOS	113	CLC	005098	Comprehensive Word Processing
CLCCC	AOS	117	CLC	000261	Machine Transcription
CLCCC	AOS	118	CLC	000262	Adv Word Process/Desktop Pub
CLCCC	AOS	119	CLC	000263	Records Management
CLCCC	AOS	122	CLC	000265	Business Mathematics
CLCCC	AOS	128	CLC	000271	Intermediate Keyboarding
CLCCC	AOS	170	CLC	000276	Computer Keyboarding I
CLCCC	AOS	171	CLC	000277	Computer Keyboarding II
CLCCC	AOS	172	CLC	000278	Business English
CLCCC	AOS	175	CLC	005096	Keyboard Speed/Accuracy Bldg
CLCCC	AOS	178	CLC	000271	Intermediate Keyboarding
CLCCC	AOS	199	CLC	004079	Business Education Elective
CLCCC	AOS	214	CLC	005099	Admin Office Procedures
CLCCC	AOS	215	CLC	005097	Presentation Software
CLCCC	AOS	216	CLC	008317	Integrated Office Projects
CLCCC	AOS	223	CLC	000285	Advanced Keyboarding
CLCCC	AOS	225	CLC	000287	Practicum in Secretarial Sci

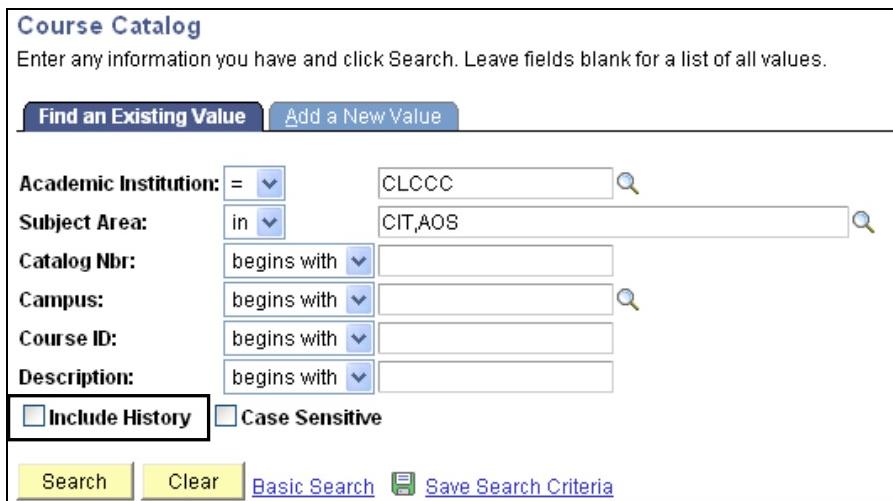
7

- Click on any of the links in the first row in the Search Results.

The course will now display.

INCLUDE HISTORY AND CORRECT HISTORY FUNCTIONS

Many of the search pages contain the Include History check box, as in the screen below:



The screenshot shows a search interface for a course catalog. At the top, there's a header "Course Catalog" with a sub-instruction: "Enter any information you have and click Search. Leave fields blank for a list of all values." Below the header are several search criteria fields with dropdown menus and input boxes. Underneath these fields are two checkboxes: "Include History" (which is checked) and "Case Sensitive". At the bottom of the search area are four buttons: "Search" (highlighted in yellow), "Clear", "Basic Search", and "Save Search Criteria".

This check box is available for effective-dated records. You may see a Correct History checkbox in some search screens as well. You can select one of these options, (they are mutually exclusive) for a search, or leave them blank.

If you check both the Include History and Correct History checkboxes, the default setting will be Include History. A description of each of these options follows:

Search Page Options	Function
Include History <input type="checkbox"/> Include History	Brings up the record up along with all of the corresponding effective-dated rows: Past, Current and Future.
Correct History <input type="checkbox"/> Correct History	Brings up the record up along with all of the corresponding effective-dated rows: Past, Current and Future.

Note To make changes to existing, effective dated rows, you must use correction mode. Keep in mind that correction access is security driven in the system, and, therefore, most users will not have this capability.

SEARCH PAGE BUTTONS

Below is a table of buttons appearing on search pages along with a description of each:

Button	Function
Search Button 	Processes the search once you have entered search criteria into the search fields. Note: You can execute a search by pressing your [Enter] key as well.
Clear Button 	Clears entered text from all of the edit boxes on the search page (without saving), so that you can reenter your search criteria.

SEARCH RESULTS

Whenever you execute a search, you can expect one of two possible outcomes:

1. **Go directly to the desired search record** – search criterion exactly matches a single record.
2. **Displays a search results list** – search criterion matches more than one record. To access any record in the search results list, click any of the hyperlinks for that record.

When your search criterion matches more than one record, you will return one of three search results.

- **Single Column Search Result List** - for smaller search results lists, you will return a list containing a single column of records. At the top of the list will be an indicator of the number of records in the list.
- **Subdivided Search Result List** - for larger search results lists, you will return multiple columns of records. At the top of the first list will be an indicator of how many total records are contained in the lists, and how they are subdivided.
- **List With Message to Narrow Search** - if the records matching your search criterion exceed 300, you will see a message at the top of the window indicating that you should further refine your search to limit the number of records returned.

SINGLE COLUMN SEARCH RESULT LIST

A single column search result list will appear, if the number of records returned is relatively small. In the example below we can see that the search results list contains 2 entries.

Search Results					
View All					
Academic Institution	Subject Area	Catalog Nbr	Campus	Course ID	Description
CLCCC	AGR	131	CLC	000129	Home Landscape Desqn
CLCCC	AGR	199	CLC	003811	Agriculture Elective

If the list of records is large enough, you may need to use your scroll bar to view all of the associated records.

SUBDIVIDED SEARCH RESULT LIST

If your search criterion matches a large number of records, they may be displayed in a subdivided list. In these cases your list will be distributed on more than one page.



Below is an example of a subdivided search result. In this example, we have returned a list of 122 records, which has been subdivided into two lists. The first list contains 100 records and the second list contains 22 records.

Search Results

[View All](#)

First

1-100 of 122

Last

Academic Institution	Subject Area	Catalog Nbr	Campus	Course ID	Description
CLCCC	ADE	1	CLC	000030	Adult Basic Education I
CLCCC	ADE	1	CLC	006541	Adult Basic Education I
CLCCC	ADE	2	CLC	000031	Adult Basic Education II
CLCCC	ADE	3	CLC	000032	Pre GED
CLCCC	ADE	6	CLC	000033	GED Preparation I
CLCCC	ADE	7	CLC	000034	GED Preparation II
CLCCC	ADE	8	CLC	000035	Constitution Workshop
CLCCC	ADE	9	CLC	000036	German Headstart
CLCCC	ADE	10	CLC	000037	Basic Skill Ed Program I
CLCCC	ADE	10	CLC	000037	Basic Skill Educa Program I
CLCCC	ADE	11	CLC	000038	Basic Skills Educ Program II
CLCCC	ADE	11	CLC	000038	Basic Skills Educa Program II

Shows
Subdivision
of Lists

LIST WITH MESSAGE TO NARROW SEARCH

The search function can retrieve up to 300 entries. If your search produces more than the 300 maximum numbers of entries, the following message will appear at the top of your search results list:

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

The following is an example of a search which produced more than 300 records.

Search Results		
Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.		
View All	First	1-100 of 300
	Last	
Subject Area	Academic Organization	Description
ABE	ACEDV	Adult Basic Education
ABR	EGRDV	Automotive Collision Repair
ACC	BUSDV	Accounting
ACR	EGRDV	Air Condition & Refrigeration
ADE	ACEDV	Adult Education
AGR	BIODV	Agriculture
AIB	BUSDV	Finance & Credit
ANT	SOCDV	Anthropology
AOS	BUSDV	Administrative Office Systems
ARA	COMDV	Arabic
ARC	EGRDV	Architectural Technology
ART	COMDV	Art
AST	EGRDV	Astronomy
AUT	EGRDV	Automotive Technology
BCT	EGRDV	Building Construction Tech
BIO	BIODY	Biology
BSS	BUSDV	Administrative Office Systems
BUS	BUSDV	Business Administration
CAD	EGRDV	Computer Aided Design
CALH	ACEDV	Continuing-Allied Health

When this kind of search result occurs you should refine your search by adding additional criteria to get a smaller search result.

MOVING BETWEEN RECORDS IN A SEARCH LIST

When your search produces a large number of records, your search results list will include navigation functions to allow you to move from record to record in the list. Below is a navigation header for a search list:

[View All](#)First  1-100 of 158  [Last](#)

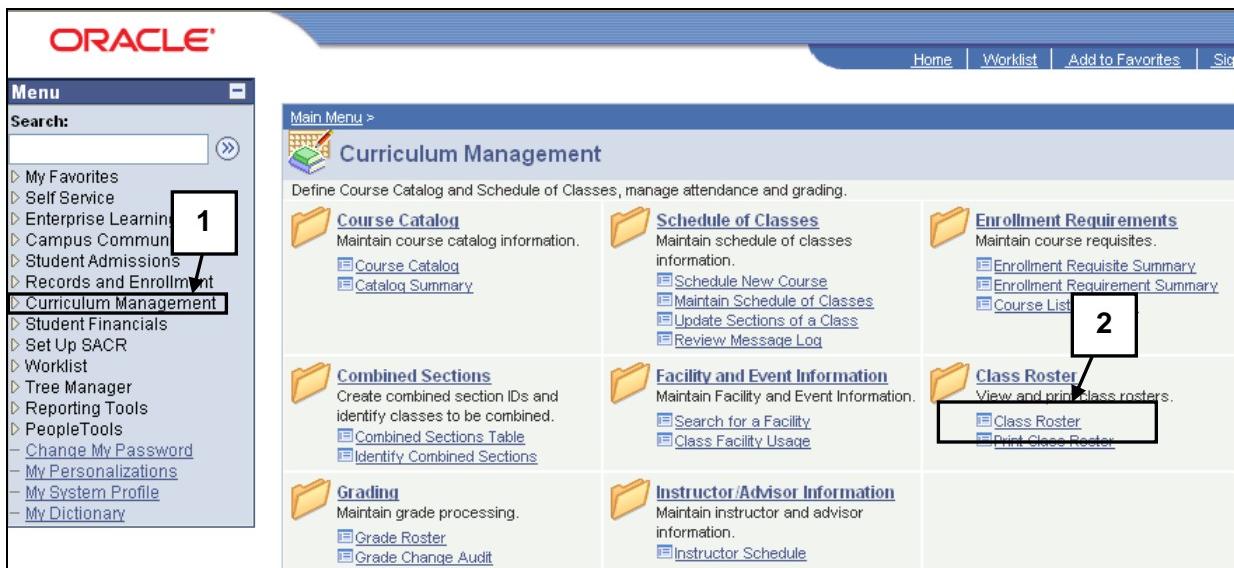
The table that follows provides a list of each navigation tool along with a description:

Button or Link	Function
View All	Allows you to view all records in the search result list on the screen at the same time. Note: This will be grayed out if the full search result list is already displayed.
First	Takes you to the first record in the search results list. Note: This will be grayed out if you are already on the first record.
Left Arrow 	In a single column search result list, moves you one record at a time backward through the search results list. In a subdivided list, moves you backward one list at a time. Note: This will be grayed out if you are already on the first record or list.
Right Arrow 	In a single column search result list, moves you one record at a time forward through the search results list. In a subdivided list, moves you forward one list at a time. Note: This will be grayed out if you are already on the last record or list.
Last	Takes you to the last record in the search results list. Note: This will be grayed out if you are already on the last record in the list.

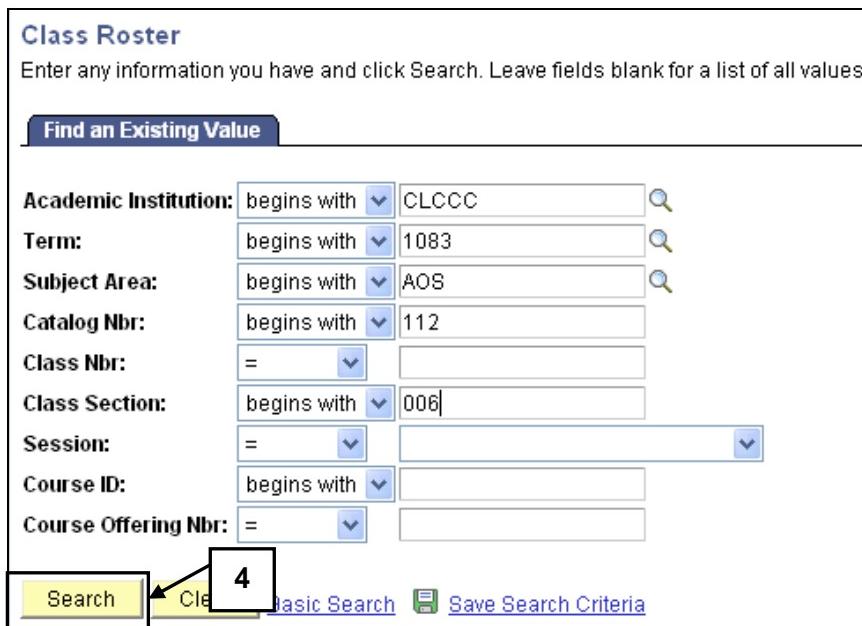
10. PRINTING

Once you have found needed information in PeopleSoft 9.0, you can easily print out the results. We will search for a specific class roster and print it out.

1. Click on **Curriculum Management** in the Menu pagelet.



2. Click on **Class Roster**.
3. Fill in the **search prompts** as seen to the right.
4. Click the **Search** button or press **Enter**.



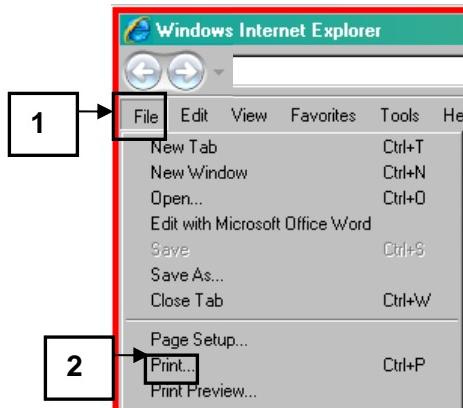
Academic Institution:	begins with	<input type="text" value="CLCCC"/>	
Term:	begins with	<input type="text" value="1083"/>	
Subject Area:	begins with	<input type="text" value="AOS"/>	
Catalog Nbr:	begins with	<input type="text" value="112"/>	
Class Nbr:	=	<input type="text"/>	
Class Section:	begins with	<input type="text" value="006"/>	
Session:	=	<input type="text"/>	
Course ID:	begins with	<input type="text"/>	
Course Offering Nbr:	=	<input type="text"/>	
<input style="background-color: #ffffcc; border: 1px solid #ccc; padding: 2px 10px; margin-right: 10px;" type="button" value="Search"/> <input style="background-color: #cccccc; color: white; border: 1px solid #ccc; padding: 2px 10px;" type="button" value="Clear"/> Basic Search Save Search Criteria			

The class roster will display as seen below.

Class Roster																	
AOS 112 .001		Automated Office Technologies															
Lecture (543)																	
Spring 2008 Regular Academic Session College of Lake County Academic																	
* Meeting Information																	
Course ID	Days & Times	Room	Instructor	Meeting Dates	Topic	Mid Term Date	Last Date to Withdraw with Refund & No Grade	Last Date to Withdraw with Grade	Last Day to Complete an Incomplete								
004748	TuTh 9:30AM - 10:45AM	T217 - Grayslake Campus	Lauren LoPresi	01/22/2008 - 05/15/2008	Lecture/Lab	03/19/2008	02/07/2008	04/09/2008	05/14/2008								
*Enrollment status: Enrolled																	
Enrollment Capacity: 24		Enrolled: 24															
Enrolled Students																	
ID	Name	Telephone	Grade Basis	Program and Plan	Level	Status Note	Grade Input	Units Taken	Drop Date	Primary Academic Program							
1 0312395	Adams,Helen M	847/244-5682	Graded	Administrative Office Systems - Administrative Assistant Cert	Freshman			3.00		Administrative Office Systems							
2 0462249	Bautista,Maritza L		Graded	Medical Assisting - Medical Assisting	Freshman			3.00		Medical Assisting							
3 0449550	Boose,Dushanna M		Graded	Associate Transfer Degree - Associate in Science	Freshman	Withdrawn W			03/04/2008	Associate Transfer Degree							
4 0409792	Goldberg,AnneMarie	847/726-2428	Graded	General Studies - General Studies	Freshman			3.00		General Studies							
5 0494511	Goldmann,Jana		Graded	English as a Second Language - English as a Second Lang-Begin	Freshman			3.00		English as a Second Language							
6 0271983	Hillebrand,Kathleen A	847/265-7037	Graded	Health Information Technology - Medical Office Specialist	Freshman			3.00		Health Information Technology							
7 0491312	Horton,Sandra D	847/838-0892	Graded	Nursing - Registered Nursing	Freshman			3.00		Nursing							
8 0457646	Kogan,Mathew Lee	847/520-7325	Graded	Administrative Office Systems - General Office/Administrative Assistant Cert	Freshman			3.00		Administrative Office Systems							
				Administrative Office Systems -													

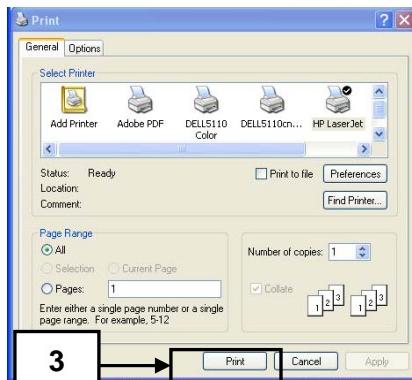
PRINTING OPTION #1 – FILE > PRINT

1. Select **File** from the main menu in Microsoft Internet Explorer.
2. Select **Print**.



The Print window displays.

3. Click the **Print** button to send the roster to the printer.



Note Any printed output from PeopleSoft pages will be displayed as a .pdf file in the reports manager. It is no longer necessary to go to a ‘Reports Drive’ to get output.

PRINTING OPTION #2 – PRINTER FRIENDLY VERSION

Some windows will include a “Printer Friendly Version” button. This button will allow you to preformat the screen to fit on an 8-1/2” x 11” piece of paper.

1. While the class roster is displayed, scroll to the bottom of the roster.
2. Click on the **Printer Friendly Version** button.

A screenshot of a 'Enrolled Students' table. The table has columns for Photo, ID, Name, Grade Basis, Units, Primary Academic Program, Program and Plan, and Level. There are 6 rows of student data. At the bottom of the table, there is a green rectangular button labeled 'PRINTER FRIENDLY VERSION'. A red box with the number '2' is placed over the top-left corner of this button.

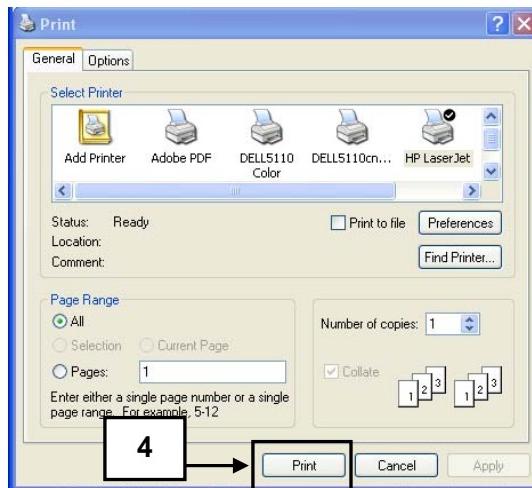
Enrolled Students								Customize
	Photo	ID	Name	Grade Basis	Units	Primary Academic Program	Program and Plan	Level
1		0505150	Bell,Patricia Ann	Graded	3.00	CARER	Career Degree or Certificate - Administrative Assistant	Sophomore
2		0007304	Bone,Alva J	Graded	3.00	CARER	Career Degree or Certificate - Administrative Assistant	Sophomore
3		0450617	Brito,Tricia B	Graded	3.00	CARER	Career Degree or Certificate - Business Management/Supervisio	Sophomore
4		0516233	Evans,Lula Marie	Graded	3.00	CARER	Career Degree or Certificate - Administrative Assistant Cert	Freshman
5		0502232	Hernandez,Deisy	Graded	3.00	TRANS	Associate Transfer Degree - Associate in Arts	Sophomore
6		0525739	Madura,Cheryl Sue	Graded	3.00	CARER	Career Degree or Certificate - Administrative Assistant Cert	Freshman

The printer friendly version of the roster appears on the screen.

3. Click **Ctrl+P**.

The print window appears.

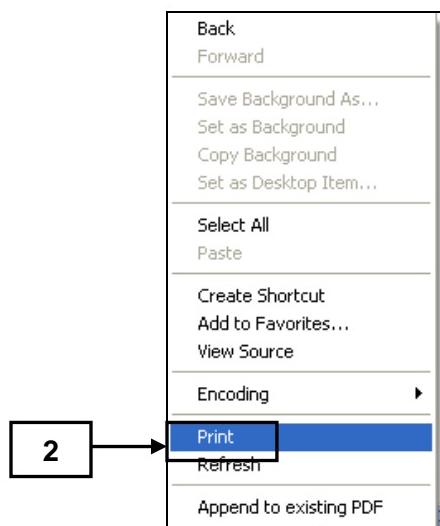
4. Click **Print** to print the roster.



PRINTING OPTION #3 – RIGHT-CLICK

1. **Right-click** anywhere on the roster page.

A dialogue box appears.



2. Select **Print**.

The print window appears.

3. Click **Print** to print the roster.

PRINTING OPTION #4 – RIGHT-CLICK FOR INFORMATION THAT IS LARGER THAN A SCREEN

1. **Right-click** anywhere on the roster page.

The dialogue box appears

2. Select **Print Preview**.

Class Roster

AOS 112 - 001 Automated Office Technologies
 Lecture (5433)
 Spring 2008 | Regular Academic Session | College of Lake County | Academic

[Class Detail](#)

Meeting Information

Course ID	Days & Times	Room	Instructor	Meeting Dates	Topic	Mid Term Date	Last Withdrawn Date	Last Day to Complete an Incomplete
004748	TuTh 9:30AM - 10:45AM	T217 - Grayslake Campus	Lauren LoPresti	01/22/2008 - 05/15/2008	Lecture/Lab	03/19/2008	02/28/2008	09/14/2008

*Enrollment Status: [Enrolled](#)

Enrollment Capacity: 24 Enrolled: 24

Enrolled Students

ID	Name	Telephone	Grade Basis	Program and Plan	Term	Status Note
1 0312395	Adams Helen M	847/244-5682	Graded	Administrative Office Systems Administrative Assistant Medical Assisting - Medical	Summer	man

2

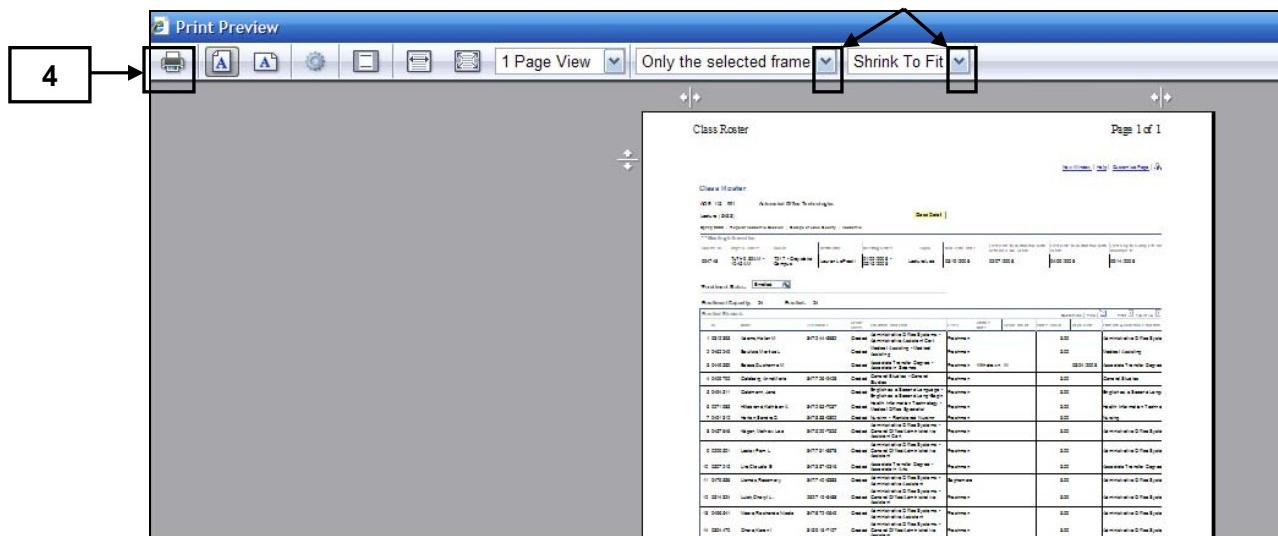
Contextual menu open over the status note field:

- Back
- Forward
- Save Background As...
- Set as background
- Copy Background
- Select All
- Paste
- Create Shortcut
- Add to Favorites...
- View Source
- Encoding
- Print...
- Print Preview
- Refresh
- Export to Microsoft Excel

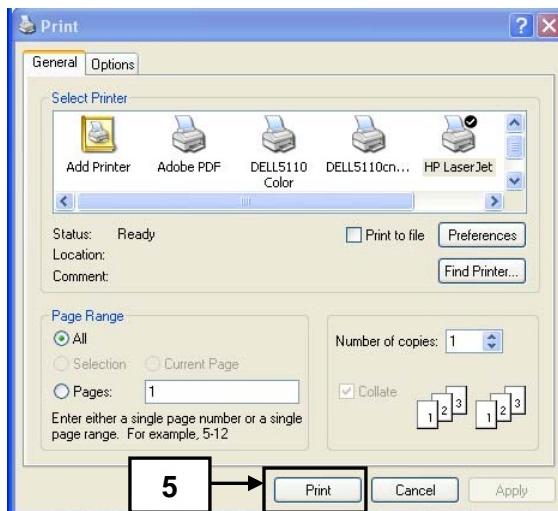
Buttons at the bottom right:

- First
- 1-24 of 24
- Last
- Customize
- Find
- Drop Date
- Primary Academic Program

3. On the Print Preview window, select **Only the selected frame** → **Shrink to Fit**.
4. Click **Print**.



The print window appears.

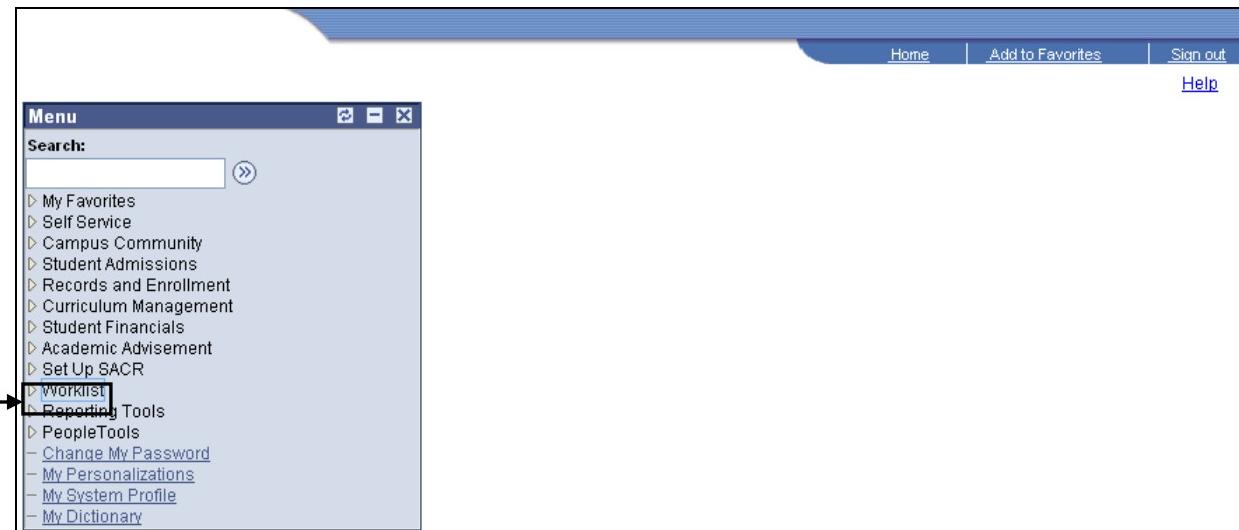


5. Click **Print** to print roster.

11. USING 19th 41st HOUR

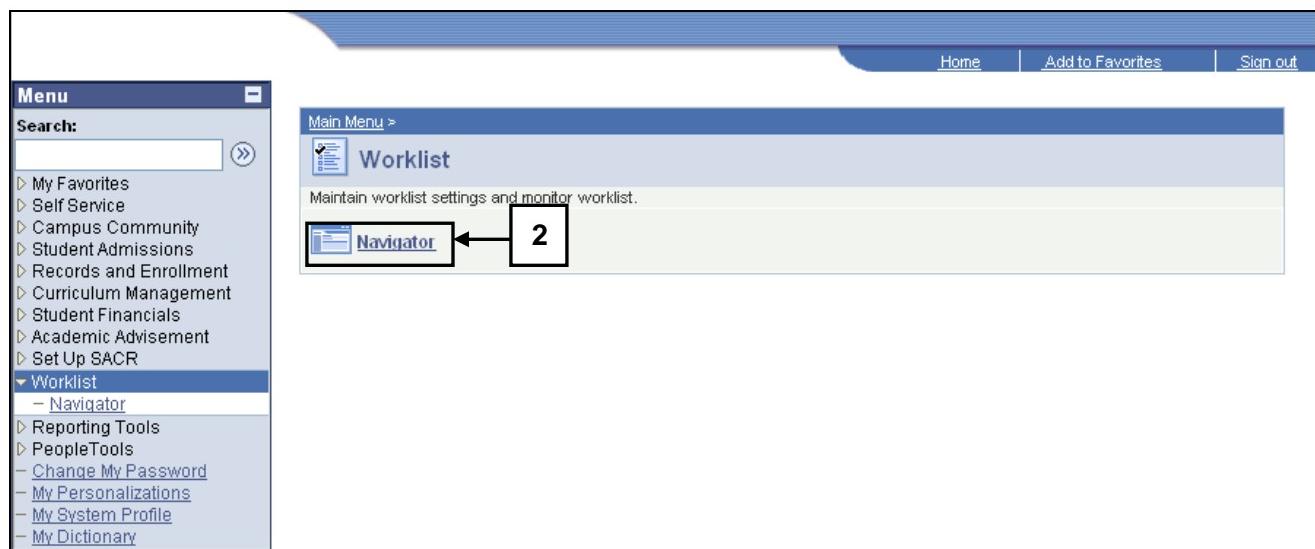
To access 19th 41st Hour:

1. Click on **Worklist**.



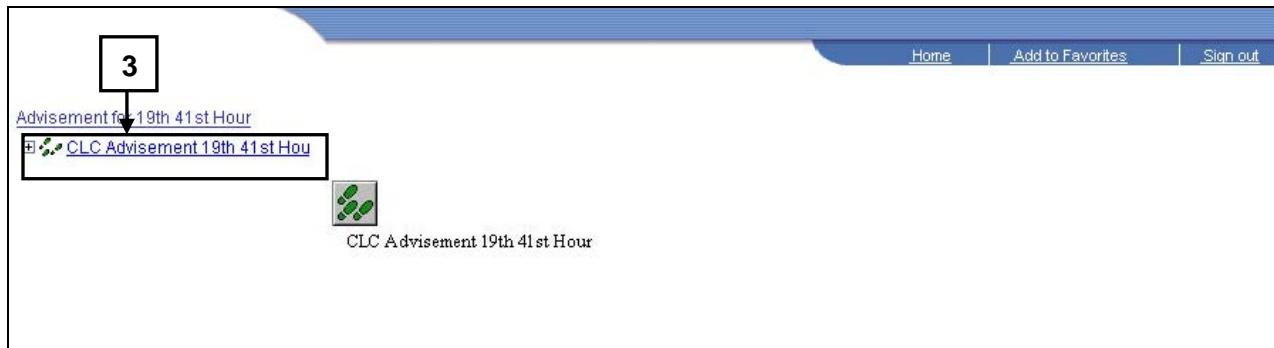
Worklist Main Menu displays.

2. Click on **Navigator**.



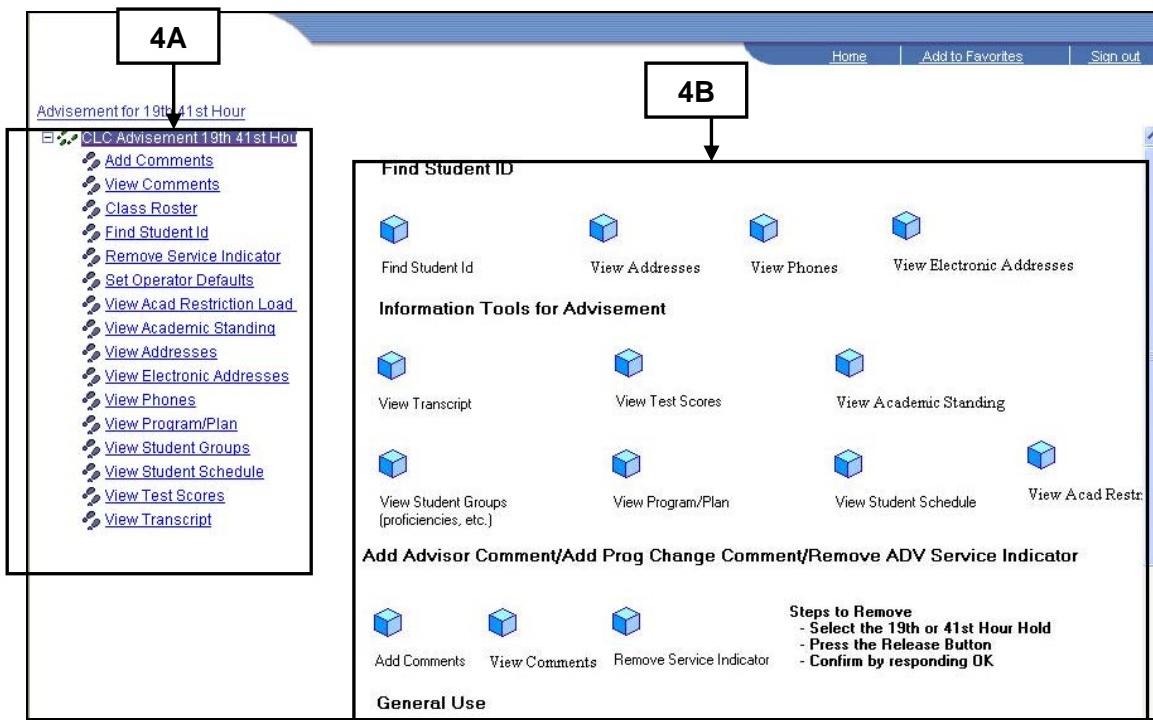
Advisement for 19th 41st Hour displays.

3. Click CLC Advisement 19th 41st Hour.



CLC Advisement 19th 41st Hour footprints display.

4. Choose the one you want from the list on the left (A) OR from the icons on the right (B).



4A

Advisement for 19th 41st Hour

- CLC Advisement 19th 41st Hour
 - [Add Comments](#)
 - [View Comments](#)
 - [Class Roster](#)
 - [Find Student Id](#)
 - [Remove Service Indicator](#)
 - [Set Operator Defaults](#)
 - [View Acad Restriction Load](#)
 - [View Academic Standing](#)
 - [View Addresses](#)
 - [View Electronic Addresses](#)
 - [View Phones](#)
 - [View Program/Plan](#)
 - [View Student Groups](#)
 - [View Student Schedule](#)
 - [View Test Scores](#)
 - [View Transcript](#)

4B

Find Student ID

Find Student Id	View Addresses	View Phones	View Electronic Addresses

Information Tools for Advisement

View Transcript	View Test Scores	View Academic Standing

View Student Groups (proficiencies, etc.)	View Program/Plan	View Student Schedule	View Acad Restr:

Add Advisor Comment/Add Prog Change Comment/Remove ADV Service Indicator

Add Comments	View Comments	Remove Service Indicator

Steps to Remove

- Select the 19th or 41st Hour Hold
- Press the Release Button
- Confirm by responding OK

General Use

12. DATA NAVIGATION

TABBING BETWEEN FIELDS

When you are in a data entry screen, you should press your [Tab] key to move to the next data field in the window. The [Tab] key moves you one field at a time in a predetermined sequence in the window. To move to the next field, press the [Tab] key again. To move backward one field at a time in the window, press [Shift]+[Tab].

Note You may also click on any edit box in the page rather than tabbing to it.

SCROLL AREAS

Scroll areas allow you to view one record at a time in a page. Each component in the system is made up of one or more scroll areas. Each scroll area contains information that is randomly arranged on the screen.

A scroll area looks like a data entry page with navigation tools in the header. Below is an example of a scroll area for the Course Catalog component:

Navigation Tools



Class Sections

*Session:	1	Regular Academic Session	Class Nbr:	1012	[+]	[-]	
*Class Section:	001		*Start/End Date:	08/26/2003		12/18/2003	
*Component:	LEC		Lecture	Event ID:	000044760		
*Class Type:	Enrollment				Add Fee		
*Associated Class:	1					<input checked="" type="checkbox"/> Schedule Print	
*Campus:	CLC	CLC				<input checked="" type="checkbox"/> Student Specific Permissions	
*Location:	GLC		CLC, Grayslake Campus				<input type="checkbox"/> Dynamic Date Calc Required
Course Administrator:					<input type="checkbox"/> Generate Class Mtg Attendance		
*Academic Organization:	BUSDV		Business Division				<input type="checkbox"/> GL Interface Required
Academic Group:	CLC	College of Lake County					
*Holiday Schedule:	ACAD		Academic Holiday Schedule				
*Instruction Mode:	D		Discussion/Lecture				
Primary Instr Section:	001						

To navigate through the data in the scroll area, use the navigation tools in the header. A description of each of these navigation tools can be found in the “Moving Between Records in a Search List” section of this manual. However, there is one additional tool for navigation in a scroll area, the Find function, which is described in the table below:

Button or Link	Function
Find Find	<p>Brings up a search dialog box, where you can type in any combination of words to conduct a search for a particular record:</p>  <p>To use the search function, type your search string and press the OK button. Note: This will be grayed out if there is only a single record.</p>

COLLAPSIBLE AREAS

Some of the scroll areas can be collapsed entirely and then expanded. Scroll areas containing a right-pointing triangle, ▶, in front of the heading, have been collapsed, and none of the data in the area will be in view. Panels containing a downward-pointing triangle, ▼, are expanded, so that all of the data in the panel is in view. To collapse an expanded area, click the downward-pointing arrow, ▼, to the left of the heading.

Below are collapsed and expanded versions of the same area:

Collapsed Panel

▶  USA

▼ **Left-pointing Triangle**

Expanded Panel

▼  USA

Ethnic Group:
[Ethnicity Detail](#)

Disabled Veteran
 VA Benefit

▼ **Downward-pointing Triangle**

! Warning ! –

Do not keep pushing the same button repeatedly. The system will need time to respond to each request. Always wait until the current function completes before pushing the same or additional buttons.

SEARCHING FOR BIO/DEMO DATA IN THE SYSTEM

Not all users at the college will have access to the Bio/Demo component in the system. However, we have included this section as many users will have access to this area.

To look up people information in the system:

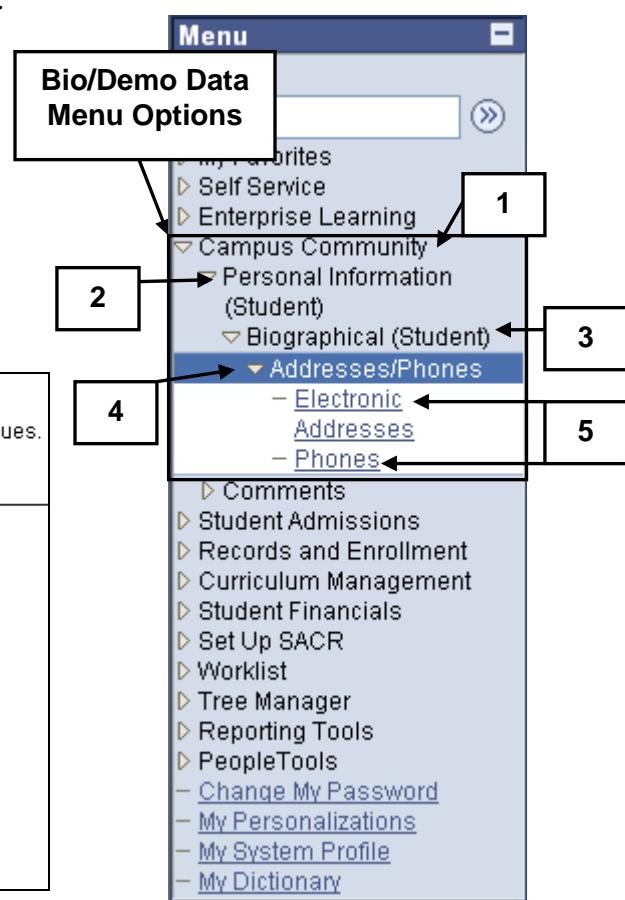
1. Click on **Campus Community** in the menu pagelet.
2. Click on **Personal Information (Student)** in the submenu.
3. Click on **Biographical (Student)** in the submenu.
4. Click on **Addresses/Phones** in the submenu.
5. Click on **Electronic Addresses** or **Phone** hyperlink.

A search screen will display.

Electronic Addresses

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value	
EmplID:	<input style="width: 150px;" type="text"/> begins with <input type="button" value="▼"/>
Academic Career:	= <input type="button" value="▼"/> Academic Career <input type="button" value="▼"/>
National ID:	<input style="width: 150px;" type="text"/> begins with <input type="button" value="▼"/>
Campus ID:	<input style="width: 150px;" type="text"/> begins with <input type="button" value="▼"/>
Last Name:	<input style="width: 150px;" type="text"/> begins with <input type="button" value="▼"/>
First Name:	<input style="width: 150px;" type="text"/> begins with <input type="button" value="▼"/>
<input type="checkbox"/> Case Sensitive	
<input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Basic Search"/> <input type="button" value="Save Search Criteria"/>	



6. Conduct a search for the desired student.
7. Select the record for the desired person.

13. SETTING USER DEFAULTS

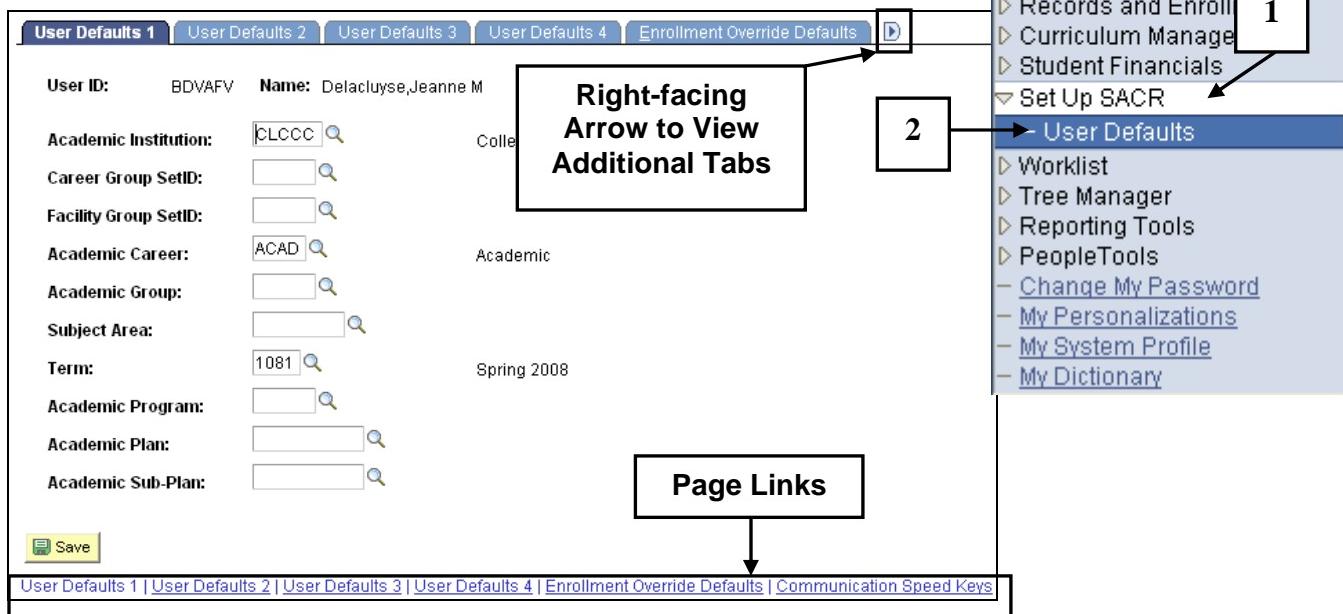
To save time on data entry, you can set up the system so that it will automatically fill in certain fields for you with default values. Setting up default values eliminates the need to key values for these fields. You can simply press [Tab], and the default value will automatically be entered. For example, if most CLC students live in Illinois, you could set the default value for the State field to IL.

Even after establishing default values for fields, you may override default values at any point during the data entry process by simply typing over existing values. For example, if you have a student who lives in Wisconsin, rather than Illinois, you can type WI in the state field, and the WI entry will override the default entry of IL.

To view user defaults:

1. Click **Set Up SACR** on the menu.
2. Click the **User Defaults** submenu.

The User Defaults component will display, as seen below.



The diagram illustrates the User Defaults component. On the left is a screenshot of the User Defaults screen. At the top, there are five tabs: User Defaults 1, User Defaults 2, User Defaults 3, User Defaults 4, and Enrollment Override Defaults. A right-facing arrow is positioned to the left of the tabs, with a callout box labeled "Right-facing Arrow to View Additional Tabs". Below the tabs, there are several input fields for User ID, Academic Institution (set to PLCCC), Name (Delacluyse, Jeanne M), Career Group SetID, Facility Group SetID, Academic Career (ACAD), Academic Group, Subject Area, Term (1081, Spring 2008), Academic Program, Academic Plan, and Academic Sub-Plan. A "Save" button is located at the bottom left. At the bottom of the screen, there is a horizontal bar with links: User Defaults 1 | User Defaults 2 | User Defaults 3 | User Defaults 4 | Enrollment Override Defaults | Communication Speed Keys. On the right is a screenshot of the PeopleSoft menu. Numbered callouts point to specific items: 1 points to the "Set Up SACR" item under the "Student Admissions" category; 2 points to the "User Defaults" item under the "Worklist" category. A large callout box labeled "Page Links" points to the bottom of the User Defaults screen.

Notice that there are five different default value categories that appear as tabs across the top of User Defaults screen:

- User Defaults 1
- User Defaults 2
- User Defaults 3
- User Defaults 4
- Enrollment Override Defaults

There are two additional categories that do not display, Communication Speed Keys and User 3C Group Summary. To access these areas, simply click on the page links at the bottom of the screen or click on the right-facing arrow to the left of the page tabs.

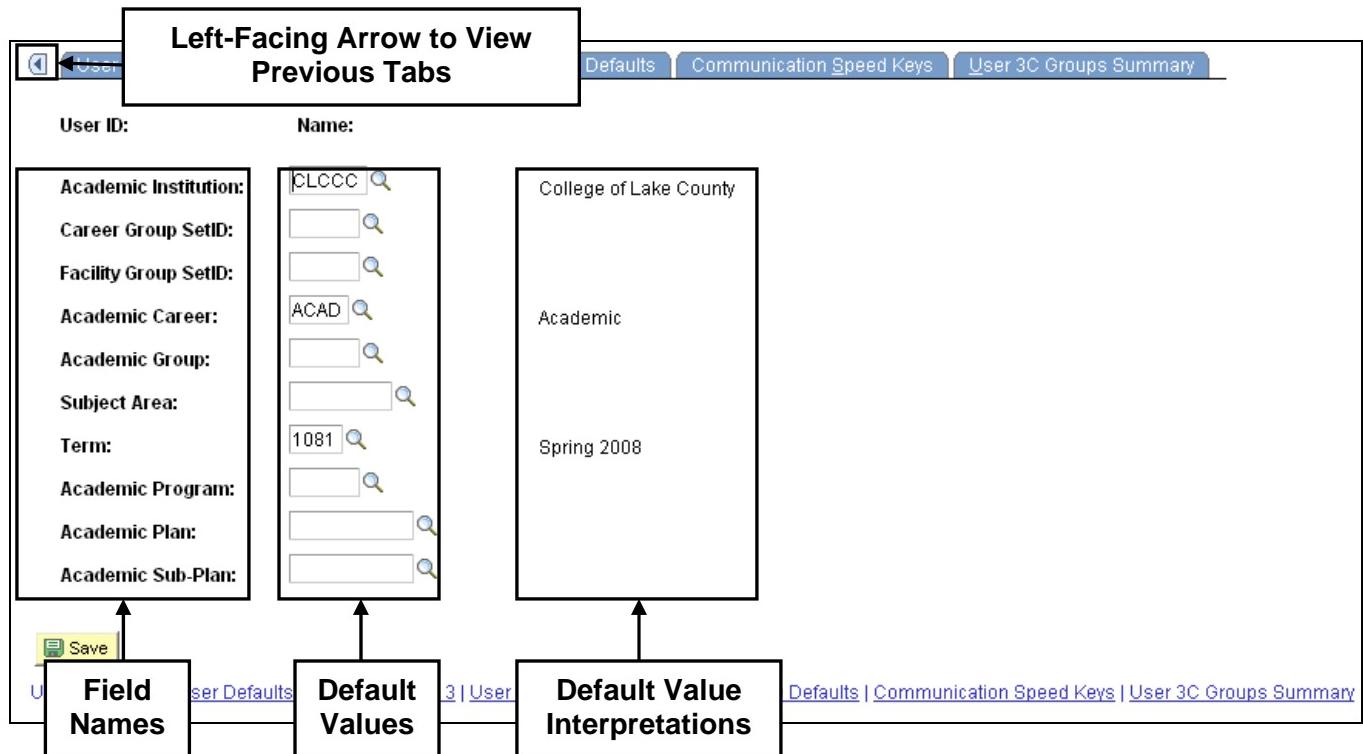


In the screen above, you can see only the first five default value category tables. However, all seven of the default value categories appear as links at the bottom of the page.

Each of these tabs, or links, includes a different set of fields for which you can set defaults. Also notice the right-facing arrow, , at the end of the default value category tabs. If the right-facing arrow, , is present in the tabs row it indicates that there are additional tabs, that are not shown.

3. To see the additional **categories of default values**, press this arrow, , at the end of the tabs and the additional tab will appear, or simply click on the **default value hyperlinks** at the bottom of the page.

If you click on the right-facing arrow at the end of the default category tabs, , you will now see any additional default value category tabs that are available. In this case, we can now see the Communication Speed Keys and User 3C Groups Summary tabs. Once you click on the right-facing arrow, , you will see a left-facing arrow, , indicating that the tabs have been expanded. To view the original default value category tabs, click on the left-facing arrow, , to the left of the tabs.



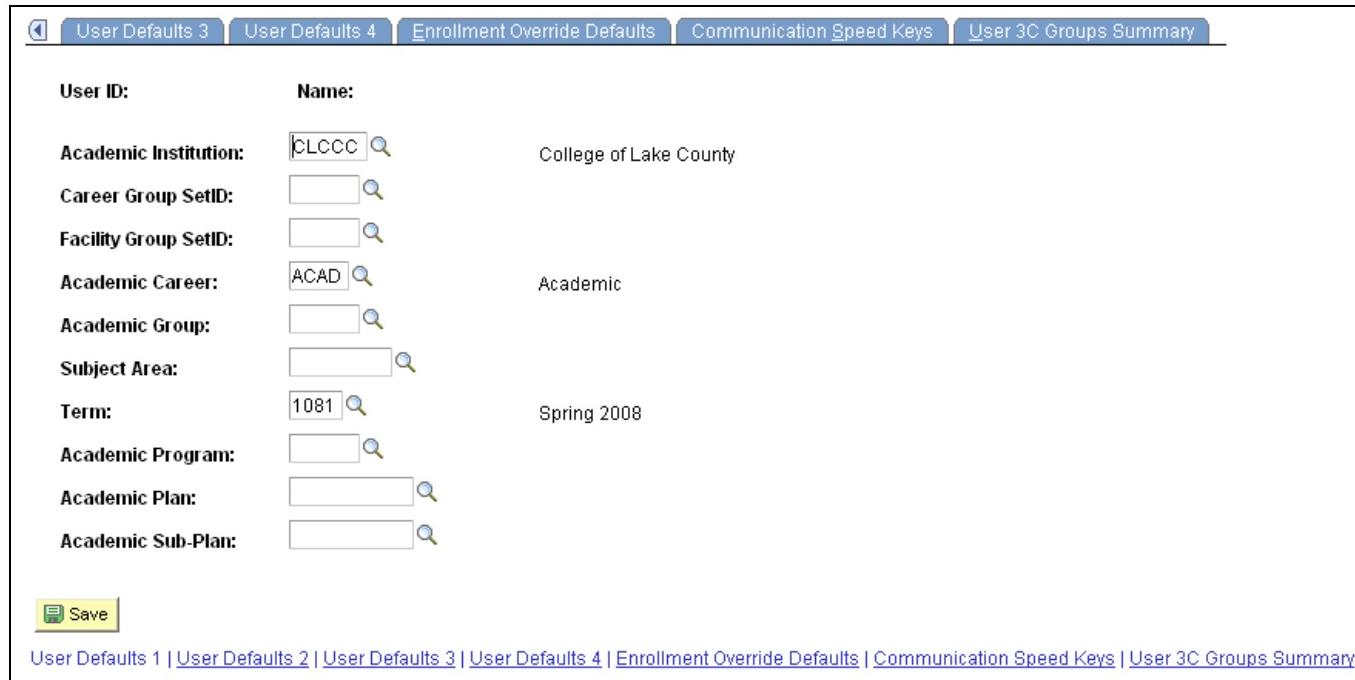
Clicking on any of the default value category tabs, or links, will bring up a screen of available fields. Three types of information are available on the User Defaults page:

- **Field Names** - appear in bold in the first column of the screen and contain the names of the data fields.
 - **Default Values** - appear in the second column and contain the default value for the field, if one is defined. If the default value box is left empty, there is no default defined for the field. These values are usually stored as codes in the system.
 - **Default Value Interpretations** - appear in the third column and provide text interpretations for the default values, or codes, in the system.

For example, in the screen above, you will see that the first default value, Academic Institution, is CLCCC, which stands for College of Lake County. You will also note that some of the values have been given a default value. However, other fields have been left blank. You set your system defaults to make data entry easier for you.

To create a default value for a field:

1. Click on the **tab containing the field for which you would like to create a default value**. If you are unsure, you may need to click on different tabs to locate the field.
2. Click on the **magnifying glass, **, to the right of the default value box for the field for which you would like to create a default value.



The screenshot shows a form titled "User Defaults 3" with the following fields and their current values:

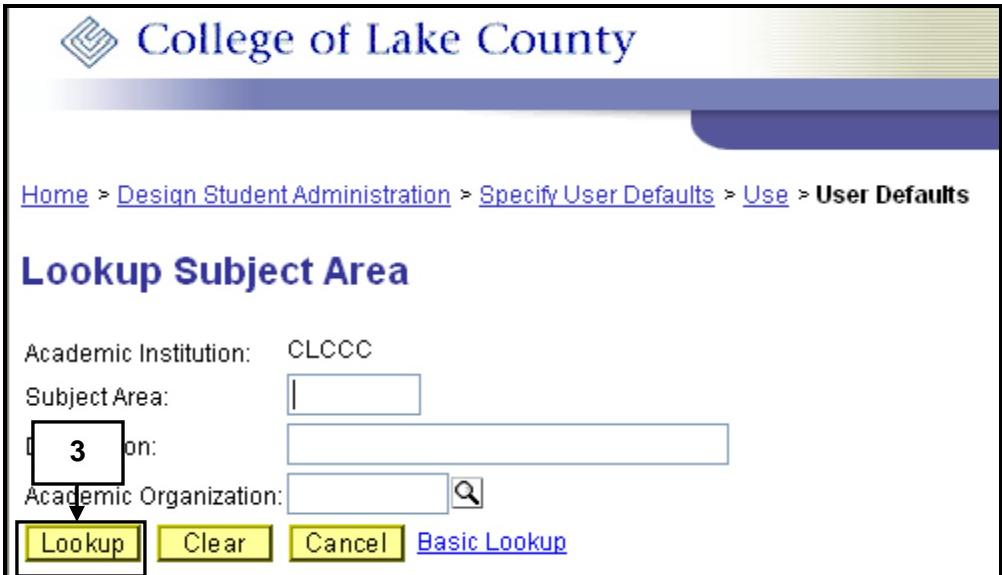
User ID:	Name:
Academic Institution:	CLCCC 
Career Group SetID:	<input type="text"/> 
Facility Group SetID:	<input type="text"/> 
Academic Career:	ACAD 
Academic Group:	<input type="text"/> 
Subject Area:	<input type="text"/> 
Term:	1081 
Academic Program:	<input type="text"/> 
Academic Plan:	<input type="text"/> 
Academic Sub-Plan:	<input type="text"/> 

At the bottom left is a yellow "Save" button with a disk icon. At the bottom of the page is a navigation bar with links: User Defaults 1 | User Defaults 2 | User Defaults 3 | User Defaults 4 | Enrollment Override Defaults | Communication Speed Keys | User 3C Groups Summary.

A lookup screen will appear. In this screen you will want to look up the values that are acceptable for this field. There is security built into the database that ensures that the correct type of data is entered into a field. Therefore, you cannot simply type in any value of your liking.

Note: The term code is always a four-digit code beginning with the number 1. The second and third numbers in the term code are the last two digits of the year. The fourth and last digit in the code represents the semester; the first semester of the year (spring semester) is 1, the second semester (summer semester) is 2, and the third semester (fall semester) is 3. For example, the fall semester for the year 2008 would be represented by the code 1083, where 08 is the last two digits of the year and 3 is the third semester of the years.

3. Click on the **Lookup button**, to see a list of acceptable entries for the field.



College of Lake County

Home > Design Student Administration > Specify User Defaults > Use > User Defaults

Lookup Subject Area

Academic Institution: CLCCC

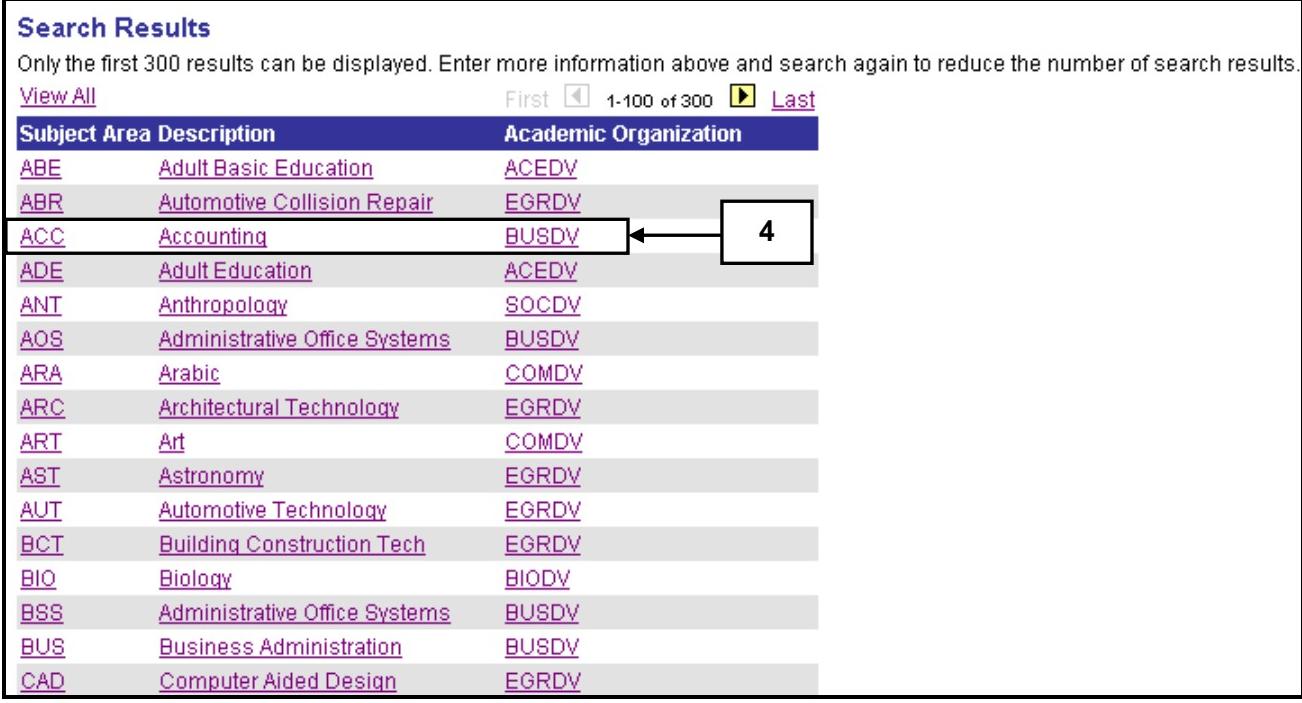
Subject Area:

3 Search:

Academic Organization: 

Lookup **Clear** **Cancel** [Basic Lookup](#)

You will now see list of acceptable entries at the bottom of the lookup screen.



Search Results
Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.
[View All](#) First  1-100 of 300  [Last](#)

Subject Area Description	Academic Organization
ABE Adult Basic Education	ACEDV
ABR Automotive Collision Repair	EGRDV
ACC Accounting	BUSDV
ADE Adult Education	ACEDV
ANT Anthropology	SOCDV
AOS Administrative Office Systems	BUSDV
ARA Arabic	COMDV
ARC Architectural Technology	EGRDV
ART Art	COMDV
AST Astronomy	EGRDV
AUT Automotive Technology	EGRDV
BCT Building Construction Tech	EGRDV
BIO Biology	BIODV
BSS Administrative Office Systems	BUSDV
BUS Business Administration	BUSDV
CAD Computer Aided Design	EGRDV

4. From the search results list, click on the **default value you would like for the field**. The new default value will now be entered in the User Defaults screen.

In this case we have selected Accounting as our default Subject Area.

5. Click the **Save** button, and the user defaults will be saved and made effective immediately.

User Defaults 3 | User Defaults 4 | Enrollment Override Defaults | Communication Speed Keys | User 3C Groups Summary

User ID:	BDVAFV	Name:	Delacluyse, Jeanne M
Academic Institution:	CLCCC 	College of Lake County	
Career Group SetID:	<input type="text"/> 		
Facility Group SetID:	<input type="text"/> 		
Academic Career:	ACAD 	Academic	
Academic Group:	<input type="text"/> 		
Subject Area:	<input type="text"/> 		
Term:	1081 	Spring 2008	
Academic Program:	<input type="text"/> 		
Academic Plan:	<input type="text"/> 		
Academic Sub-Plan:	<input type="text"/> 		

User Defaults 1 | User Defaults 2 | User Defaults 3 | User Defaults 4 | Enrollment Override Defaults | Communication Speed Keys | User 3C Groups Summary

Tip: When setting default values keep in mind that some fields are related to one another. For example, you may select a default value that is in conflict with one of the original default values in another field. When this occurs, the original default value will be removed; and you will need to re-enter a default value that is appropriate.

FIELDS WITH DEFAULTS VALUE OPTIONS

In the following section we will look at the specific fields for which you can set defaults.

Note: Please keep in mind that your default pages may appear different than the images on these pages.

USER DEFAULTS 1

Below is a screen display showing the fields available for setting defaults in the User Defaults 1 tab:

Academic Institution:	<input type="text" value="CLCCC"/> 
Career Group SetID:	<input type="text"/> 
Facility Group SetID:	<input type="text"/> 
Academic Career:	<input type="text" value="ACAD"/> 
Academic Group:	<input type="text"/> 
Subject Area:	<input type="text"/> 
Term:	<input type="text" value="1081"/> 
Academic Program:	<input type="text"/> 
Academic Plan:	<input type="text"/> 
Academic Sub-Plan:	<input type="text"/> 

USER DEFAULTS 2

Below is a screen display showing the fields available for setting defaults in the User Defaults 2 tab:

SetID:	<input type="text"/> 
Aid Year:	<input type="text"/> 
Business Unit:	<input type="text" value="CLCCC"/> 
Application Center:	<input type="text"/> 
Recruiting Center:	<input type="text"/> 
Cashier's Office:	<input type="text"/> 
Department:	<input type="text"/> 
Admit Type:	<input type="text"/> 
Campus:	<input type="text"/> 
Institution Set:	<input type="text" value="CLCCC"/> 

USER DEFAULTS 3

Below is a screen display showing the fields available for setting defaults in the User Defaults 3 tab:

Academic Level:	<input type="button" value="▼"/>
Application Method:	<input type="button" value="▼"/>
Last School Attended:	<input type="text"/> 
Graduation Date:	<input type="text"/> 
Housing Interest:	<input type="button" value="▼"/>
<input type="checkbox"/> Financial Aid Interest	
External Acad Data Defaults	
Transcript Type:	<input type="button" value="▼"/>
Transcript Rcvd Data Source:	<input type="button" value="▼"/>
Transcript Rcvd Medium:	<input type="button" value="▼"/>

USER DEFAULTS 4

Below is a screen display showing the fields available for setting defaults in the User Defaults 4 tab:

<input checked="" type="checkbox"/> Carry ID	
Output Destination:	<input type="button" value="▼"/>
Transcript Type:	<input type="button" value="▼"/> 
Flexible Transcript Type:	<input type="button" value="▼"/> 
Advisement Report Type	<input type="button" value="▼"/> 
SEVIS Default	
School Code:	<input type="text"/> 
Program Number:	<input type="text"/> 
Printer Name:	<input type="text"/> Explain

ENROLLMENT OVERRIDE DEFAULTS

Below is a screen display showing the fields available for setting defaults in the Enrollment Override Defaults tab:

Enrollment Access ID:
Default Overrides
<input type="checkbox"/> Closed Class <input type="checkbox"/> Override Unit Load <input type="checkbox"/> Override Class Permission <input type="checkbox"/> Override Requisites <input type="checkbox"/> Override Time Conflict <input type="checkbox"/> Override Action Date <input type="checkbox"/> Wait List Okay

COMMUNICATIONS SPEED KEYS DEFAULTS

Below is a screen display showing the fields available for setting defaults in the Communications Speed Keys Defaults tab:

Administrative Function		Find View All	First	1 of 1	Last
'Academic Institution:	CLCCC	College of Lake County			
'Administrative Function:	<input type="text"/>	Default Comm Key:	<input type="checkbox"/> No Default		
Comm Key					
'Comm Key:	<input type="text"/>	<input type="checkbox"/> Default Comm Key <input type="checkbox"/> Print Comment <input type="checkbox"/> Activity Completed <input type="checkbox"/> Unsuccessful Outcome			
Description:					
Short Desc:					
Category:					
Context:					
Duration:					
Method:	Direction:	Letter Code:			
Comment:					

USER 3C GROUPS SUMMARY DEFAULTS

Below is a screen display showing the fields available for setting defaults in the User 3C Groups Summary Defaults tab:

Operator Group Summary			
Institution	Description	Inquiry Indicator	Update Indicator
College of Lake County	Admissions	<input checked="" type="checkbox"/>	<input type="checkbox"/>
College of Lake County	Faculty Advisor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
College of Lake County	Business Division	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

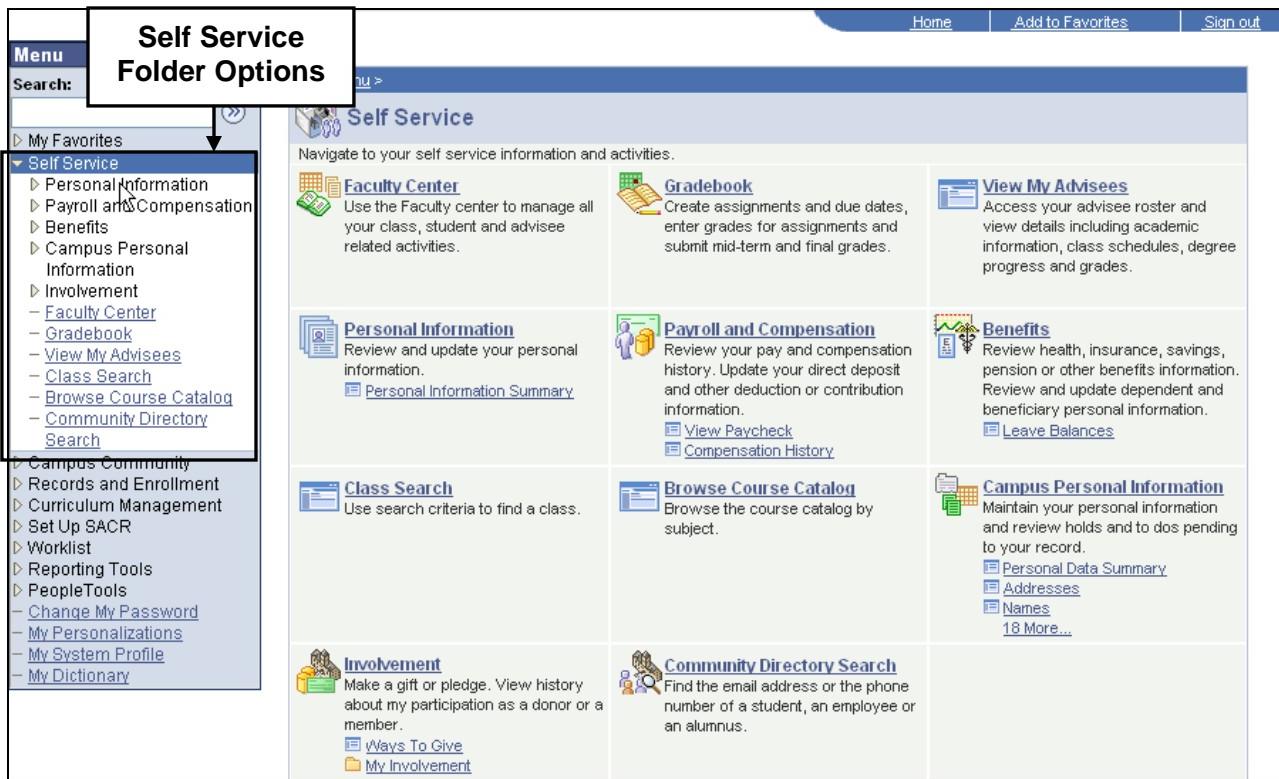
14. USING SELF SERVICE

The Self Service area in PeopleSoft 9.0 contains the following areas:

- 1) Personal Information
- 2) Payroll and Compensation
- 3) Benefits
- 4) Campus Personal Information
- 5) Involvement

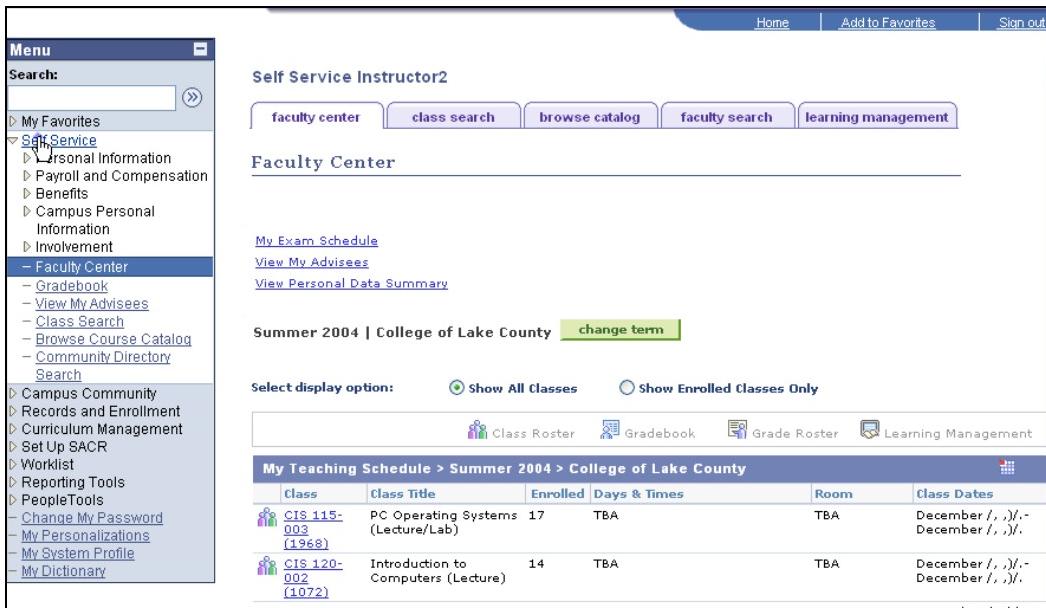
The Self Service can be accessed using the main menu and can be used by staff to look up specific information including:

- Home and mailing addresses
- Phone numbers
- Email addresses
- Emergency contacts
- Marital status
- Name changes
- Paycheck
- Direct deposit
- Compensation history
- W-4 tax information
- W-2 reissue request
- Faculty event tracking



Self Service													
Menu <input type="text" value="Search:"/> ▷ My Favorites ▷ Self Service <ul style="list-style-type: none"> ▷ Personal Information ▷ Payroll and Compensation ▷ Benefits ▷ Campus Personal Information ▷ Involvement - Faculty Center - Gradebook - View My Advisees - Class Search - Browse Course Catalog - Community Directory Search ▷ Campus Community <ul style="list-style-type: none"> ▷ Records and Enrollment ▷ Curriculum Management ▷ Set Up SACR ▷ Worklist ▷ Reporting Tools ▷ PeopleTools - Change My Password - My Personalizations - My System Profile - My Dictionary 	<div style="background-color: #e0e0e0; padding: 5px; margin-bottom: 10px;"> Self Service </div> <p>Navigate to your self service information and activities.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%; padding: 5px;"> Faculty Center  Use the Faculty center to manage all your class, student and advisee related activities. </td> <td style="width: 33%; padding: 5px;"> Gradebook  Create assignments and due dates, enter grades for assignments and submit mid-term and final grades. </td> <td style="width: 33%; padding: 5px;"> View My Advisees  Access your advisee roster and view details including academic information, class schedules, degree progress and grades. </td> </tr> <tr> <td style="width: 33%; padding: 5px;"> Personal Information  Review and update your personal information. </td> <td style="width: 33%; padding: 5px;"> Payroll and Compensation  Review your pay and compensation history. Update your direct deposit and other deduction or contribution information. </td> <td style="width: 33%; padding: 5px;"> Benefits  Review health, insurance, savings, pension or other benefits information. Review and update dependent and beneficiary personal information. </td> </tr> <tr> <td style="width: 33%; padding: 5px;"> Class Search  Use search criteria to find a class. </td> <td style="width: 33%; padding: 5px;"> Browse Course Catalog  Browse the course catalog by subject. </td> <td style="width: 33%; padding: 5px;"> Campus Personal Information  Maintain your personal information and review holds and to dos pending to your record. </td> </tr> <tr> <td style="width: 33%; padding: 5px;"> Involvement  Make a gift or pledge. View history about my participation as a donor or a member. </td> <td style="width: 33%; padding: 5px;"> Community Directory Search  Find the email address or the phone number of a student, an employee or an alumnus. </td> <td style="width: 33%; padding: 5px;"></td> </tr> </table>	Faculty Center  Use the Faculty center to manage all your class, student and advisee related activities.	Gradebook  Create assignments and due dates, enter grades for assignments and submit mid-term and final grades.	View My Advisees  Access your advisee roster and view details including academic information, class schedules, degree progress and grades.	Personal Information  Review and update your personal information.	Payroll and Compensation  Review your pay and compensation history. Update your direct deposit and other deduction or contribution information.	Benefits  Review health, insurance, savings, pension or other benefits information. Review and update dependent and beneficiary personal information.	Class Search  Use search criteria to find a class.	Browse Course Catalog  Browse the course catalog by subject.	Campus Personal Information  Maintain your personal information and review holds and to dos pending to your record.	Involvement  Make a gift or pledge. View history about my participation as a donor or a member.	Community Directory Search  Find the email address or the phone number of a student, an employee or an alumnus.	
Faculty Center  Use the Faculty center to manage all your class, student and advisee related activities.	Gradebook  Create assignments and due dates, enter grades for assignments and submit mid-term and final grades.	View My Advisees  Access your advisee roster and view details including academic information, class schedules, degree progress and grades.											
Personal Information  Review and update your personal information.	Payroll and Compensation  Review your pay and compensation history. Update your direct deposit and other deduction or contribution information.	Benefits  Review health, insurance, savings, pension or other benefits information. Review and update dependent and beneficiary personal information.											
Class Search  Use search criteria to find a class.	Browse Course Catalog  Browse the course catalog by subject.	Campus Personal Information  Maintain your personal information and review holds and to dos pending to your record.											
Involvement  Make a gift or pledge. View history about my participation as a donor or a member.	Community Directory Search  Find the email address or the phone number of a student, an employee or an alumnus.												

As you can see, in the screen below, Self Service also enables you to go directly to specific PeopleSoft pages, such as Faculty Center.



The screenshot shows the 'Self Service Instructor2' interface. On the left is a vertical menu bar with sections like 'My Favorites', 'Self Service', 'Faculty Center', 'Gradebook', 'View My Advisees', 'Class Search', 'Browse Course Catalog', 'Community Directory Search', 'Campus Community', 'Records and Enrollment', 'Curriculum Management', 'Set Up SACR', 'Worklist', 'Reporting Tools', 'PeopleTools', 'Change My Password', 'My Personalizations', 'My System Profile', and 'My Dictionary'. The 'Faculty Center' link is highlighted. At the top right are links for 'Home', 'Add to Favorites', and 'Sign out'. Below the menu, tabs for 'faculty center', 'class search', 'browse catalog', 'faculty search', and 'learning management' are visible. A 'Faculty Center' section contains links for 'My Exam Schedule', 'View My Advisees', and 'View Personal Data Summary'. A banner at the bottom says 'Summer 2004 | College of Lake County' with a 'change term' button. Below this, under 'Select display option:', there are radio buttons for 'Show All Classes' (selected) and 'Show Enrolled Classes Only'. A grid of icons includes 'Class Roster', 'Gradebook', 'Grade Roster', and 'Learning Management'. The main content area displays a table titled 'My Teaching Schedule > Summer 2004 > College of Lake County'. The table has columns for 'Class', 'Class Title', 'Enrolled', 'Days & Times', 'Room', and 'Class Dates'. It lists two classes: CIS 115-003 (PC Operating Systems 17 TBA) and CIS 120-002 (Introduction to Computers (Lecture) 14 TBA). The 'Class Dates' column indicates 'December /, ,/,- December /, ,/,' for both classes.

On the Faculty Center page, you can View Advisees and get a list of all classes being taught by term. You can also click on the tabs across the top and access:

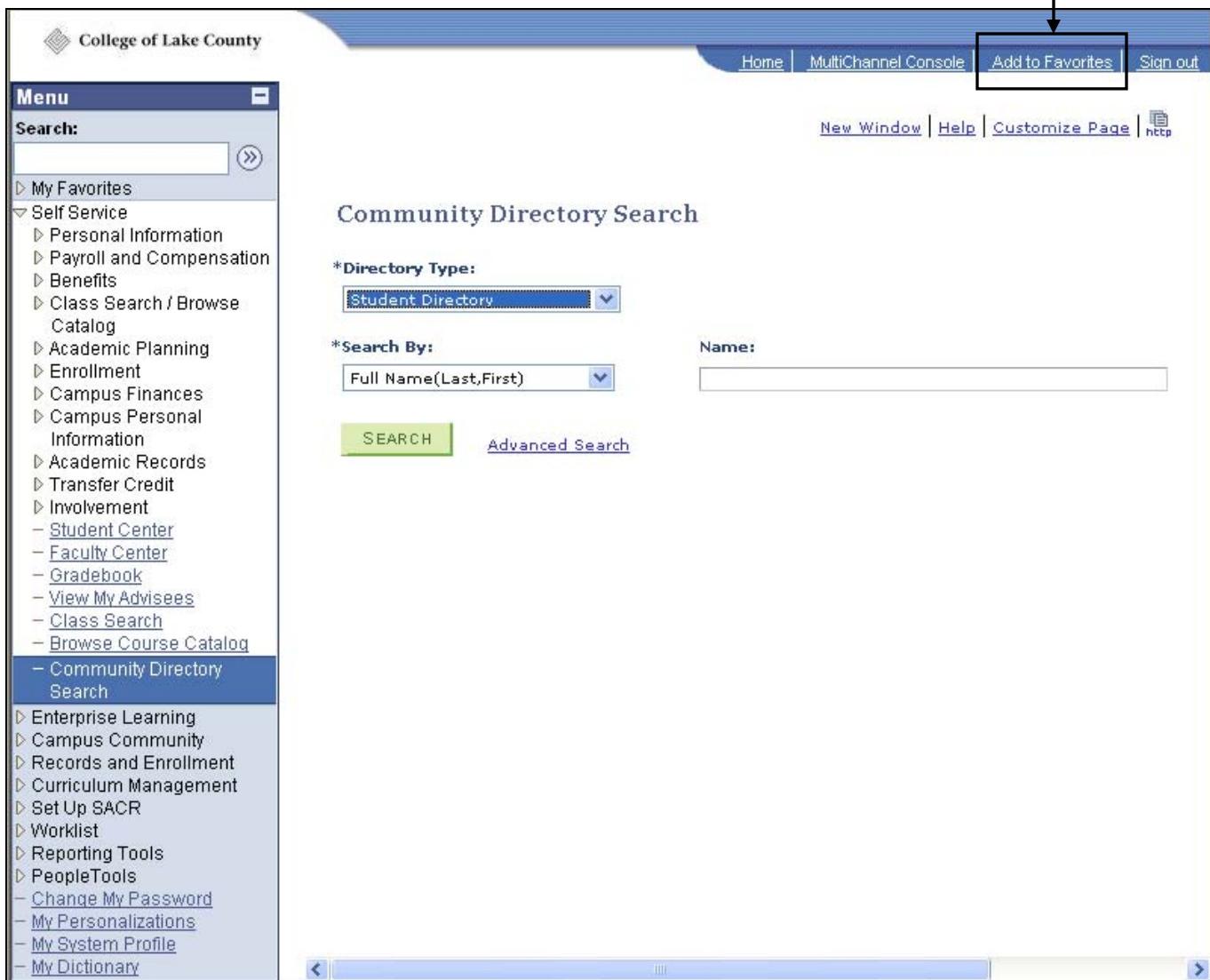
- Class Search
- Browse Catalog
- Faculty Search
- Learning Management

15. WORKING WITH FAVORITES IN PEOPLESOFT 9.0

ADDING FAVORITES

Once you start working in PeopleSoft 9.0, you will be able to set up Favorites within PeopleSoft the program. This is different from previous versions of PeopleSoft which relied on the Favorites tool inside the Microsoft Internet Explorer browser to manage Favorites.

1. Navigate to the Community Directory Search page using the path **Self Service > Involvement > Community Directory Search**.
2. Click the **Add to Favorites** link.



The screenshot shows the 'Community Directory Search' page. On the left, there is a vertical navigation menu with the following items:

- College of Lake County
- Menu
- Search: [input field] [button]
- My Favorites
- Self Service
 - Personal Information
 - Payroll and Compensation
 - Benefits
 - Class Search / Browse Catalog
 - Academic Planning
 - Enrollment
 - Campus Finances
 - Campus Personal Information
 - Academic Records
 - Transfer Credit
 - Involvement
 - Student Center
 - Faculty Center
 - Gradebook
 - View My Advisees
 - Class Search
 - Browse Course Catalog
 - Community Directory Search
- Enterprise Learning
- Campus Community
- Records and Enrollment
- Curriculum Management
- Set Up SACR
- Worklist
- Reporting Tools
- PeopleTools
- Change My Password
- My Personalizations
- My System Profile
- My Dictionary

The following window on the right appears. The Description field contains the name of the favorite. You can edit the description as needed. In this case we will keep Course Catalog as the Favorite name.



College of Lake County

Home | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page | 

Add to Favorites

Please enter a Unique Description for this Favorite

Description: Community Directory Search

OK Cancel

3. Click the **OK** button.

The Page is added to the My Favorites menu item.

4. Click on **My Favorites** in the Menu pagelet.

You will now see your Favorites, including Community Directory Search.



5. Click on the **Community Directory Search** link in My Favorites.

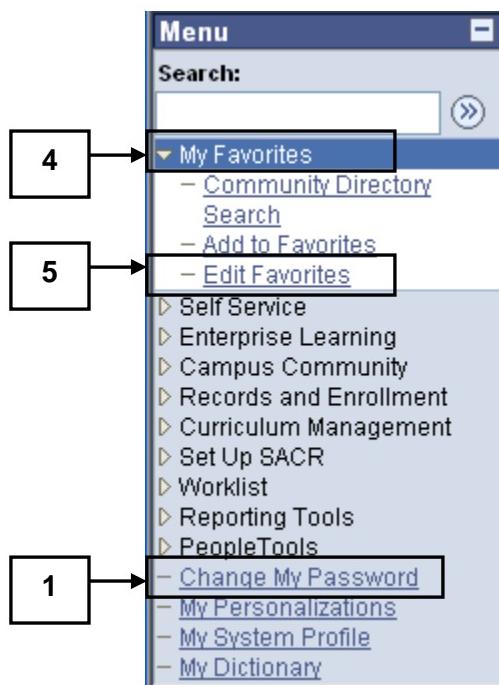
You will return to the Course Catalog search screen.

SEQUENCING AND EDITING FAVORITES

You can order your list of favorites in whatever sequence works best for you. The default is alphabetical order by menu page name, and the default sequence number is zero.

Let's add a second favorite.

1. Click on the **Change My Password** link in the Menu pagelet.



2. Click the **Add to Favorites** link.
3. Click the **OK** button.
4. Select **My Favorites** in the Menu Pagelet.
5. Select the **Edit Favorites** link under My Favorites in the Menu Pagelet.

The Edit Favorites page displays. Each favorite has 0 for a sequence number. This is the default setting that sorts items in alphabetical order. To change the sort order you must change the sequence numbers.

6. Change the Sequence number for Change My Password to **2**.
7. Change the Sequence number for Community Directory Search to **1**.
8. Click the **Save** button.

Edit Favorites

Click the Save button after editing or deleting favorites.

Favorites		Customize Find	First	1-2 of 2	Last
*Favorite	Sequence number				
Change My Password	2	6			
Community Directory Search	1	7			

8

DELETING FAVORITES

Let's delete the Change My Password favorite we just created.

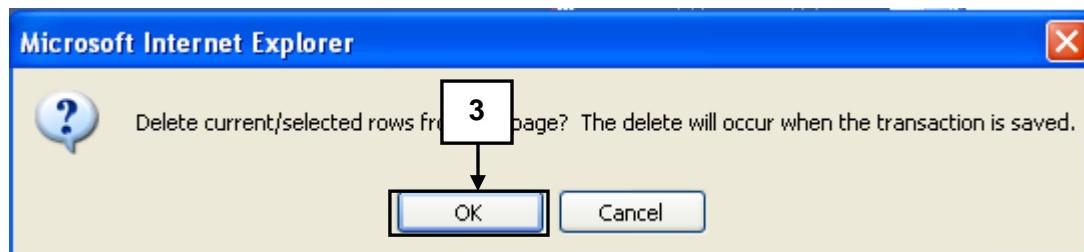
1. Select **Edit Favorites** under My Favorites in the Menu pagelet.
2. Click the **Delete** button to the right of Change My Password.

Edit Favorites

Click the Save button after editing or deleting favorites.

Favorites		Customize Find	First	1-2 of 2	Last
*Favorite	Sequence number				
Change My Password	2	Delete 2			
Community Directory Search	1	Delete			

3. Click **OK**.



4. Click the **Save** button.



Edit Favorites

Click the Save button after editing or deleting favorites.

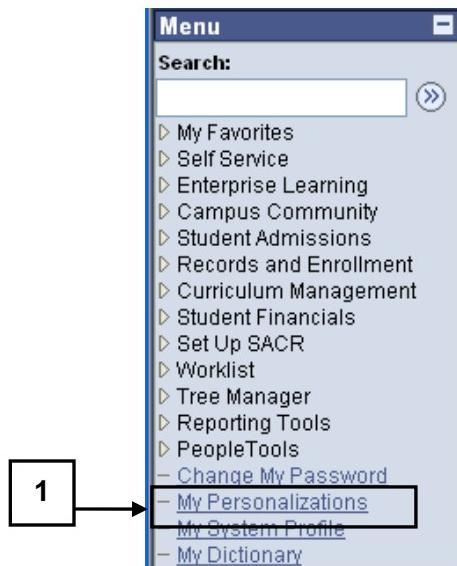
▼ Favorites		
Customize Find First 1 of 1 Last		
'Favorite	Sequence number	
Community Directory Search	1	

16. PERSONALIZATIONS

USING MY PERSONALIZATIONS

PeopleSoft 9.0 provides a section where a user can create Personalization preferences. The My Personalizations link can be found near the bottom of the Menu pagelet.

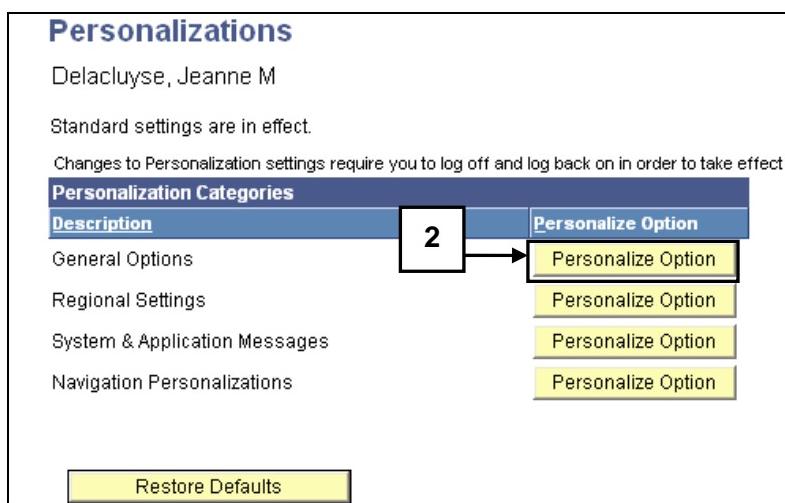
1. Click on **My Personalizations** in the Menu pagelet.



There are four areas that you can personalize:

- General Options
- Regional Settings
- System & Application Messages
- Navigation Personalizations

2. Click on the **General Options Personalize Option** button.



The following screen will appear.

Option Category: General Options

Personalizations		Find	First	1	Last
Personalization Option	Default Value	Override Value			
Accessibility Features	Accessibility features off	<input type="button" value="▼"/> Explain			
Excel 97 grid download	No	<input checked="" type="checkbox"/> Explain			
Time page held in cache	900	<input type="button" value="Explain"/>			
Multi Language Entry	No	<input type="button" value="Explain"/>			
Spell Check Dictionary	Use session language	<input type="button" value="Explain"/>			

3. Click the **down arrow** to the right of No in the Excel 97 grid download area.
4. Select **Yes**.

Option Category: General Options

Personalizations		Find	First	1-5 of 5	Last
Personalization Option	Default Value	Override Value			
Accessibility Features	Accessibility features off	<input type="button" value="▼"/> Explain			
Excel 97 grid download	No	<input checked="" type="checkbox"/> Yes			
Time page held in cache	900	<input type="button" value="Explain"/>			
Multi Language Entry	No	<input type="button" value="Explain"/>			
Spell Check Dictionary	Use session language	<input type="button" value="Explain"/>			

We have now turned on, or activated, the download function in PeopleSoft.

5. Click **OK** to save this setting.

The following window will appear.



6. Click **Return**.

You will return to the Personalizations main window.

The table below provides information regarding the various column headings in the My Personalizations area.

Column Heading	Description
Option Category	Shows the description of the category of personalizations. This helps you to make sure that you have the correct category open.
Personalization Option	This column lists all of the personalization options available for you to modify. The text that appears in the list is a brief description of the option. For more information on the option, click the Explain link.
Default Value	Refers to the initial settings that your administrator has specified for the option. If you do not modify the default value, the option assumes the value provided by the system administrator.
Override Value	Enter any custom value you want to assign to the personalization option. To “override” a default setting means to “use in place of” the default setting.
Explain	Click this link to view more information on what the personalization option provides. See the following section for more information on the Explanation page.
Restore Category Defaults	Returns all modified options to the default values. This button applies only to the current category, as in the category you have open.
OK/Cancel	After you have made any modifications, click OK so that the system records your changes. If you do not want your changes recorded click Cancel . If you have not made any changes and just viewed the options, you can use either button to return to the Personalizations page.

To learn more about the options for personalization, you should read the Explain link, in each row, adjacent to each of the Personalization Options.

Option Category: General Options

Personalizations			Find	First	1-5 of 5	Last	
Personalization Option	Default Value	Override Value					
Accessibility Features	Accessibility features off	<input type="text"/>	Explain				
Excel 97 grid download	No	<input type="text"/>	Explain				
Time page held in cache	900	<input type="text"/>	Explain				
Multi Language Entry	No	<input type="text"/>	Explain				
Spell Check Dictionary	Use session language	<input type="text"/>	Explain				
Restore Category Defaults							
OK	Cancel						

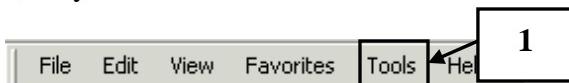


17. CLEARING YOUR BROWSER'S CACHE

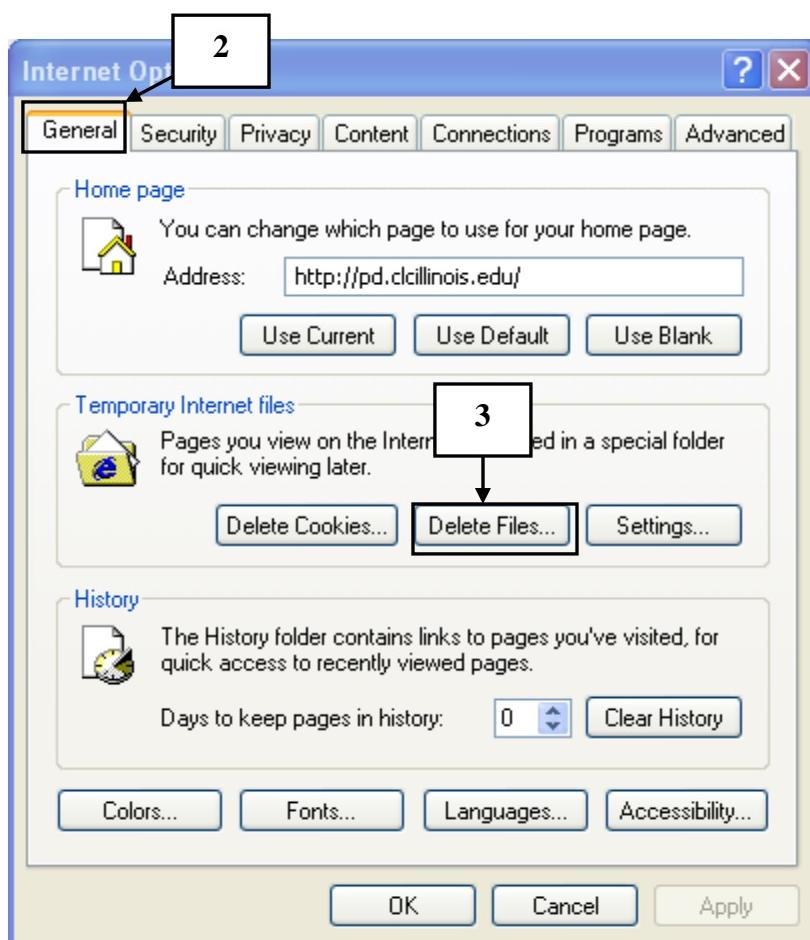
As you access Internet pages, including PeopleSoft pages, they get stored in a temporary file. As these files tend to build up over time, every so often you will want to clear out these temporary Internet folders, otherwise known as your “cache”. This should be done on a periodic basis. We recommend clearing out your cache at least monthly.

To clear out your “cache”:

1. Click on the **Tools** button, on your browser menu and then select **Internet Options...**

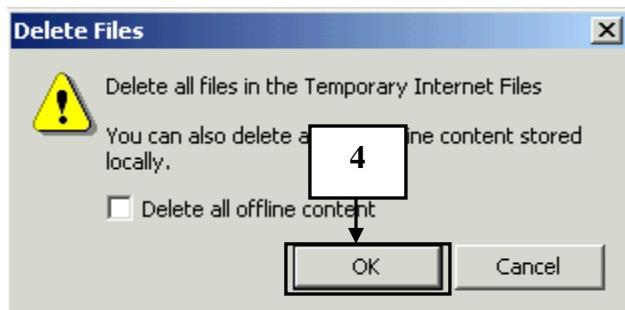


2. Click on the **General** tab.
3. Click the **Delete Files** button.





4. Click **OK** on the Delete Files window.



5. Click **OK** on the Internet Options Window.

